Onboarding Wizard

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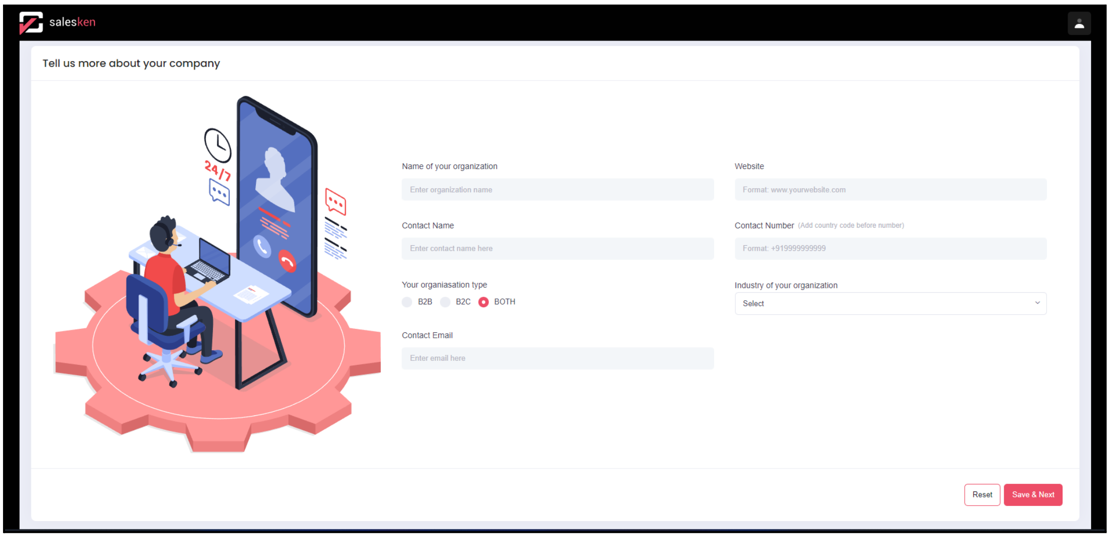
Organization:

At this page the admin can create their own organization. The admin is required to provide Salesken with following details:

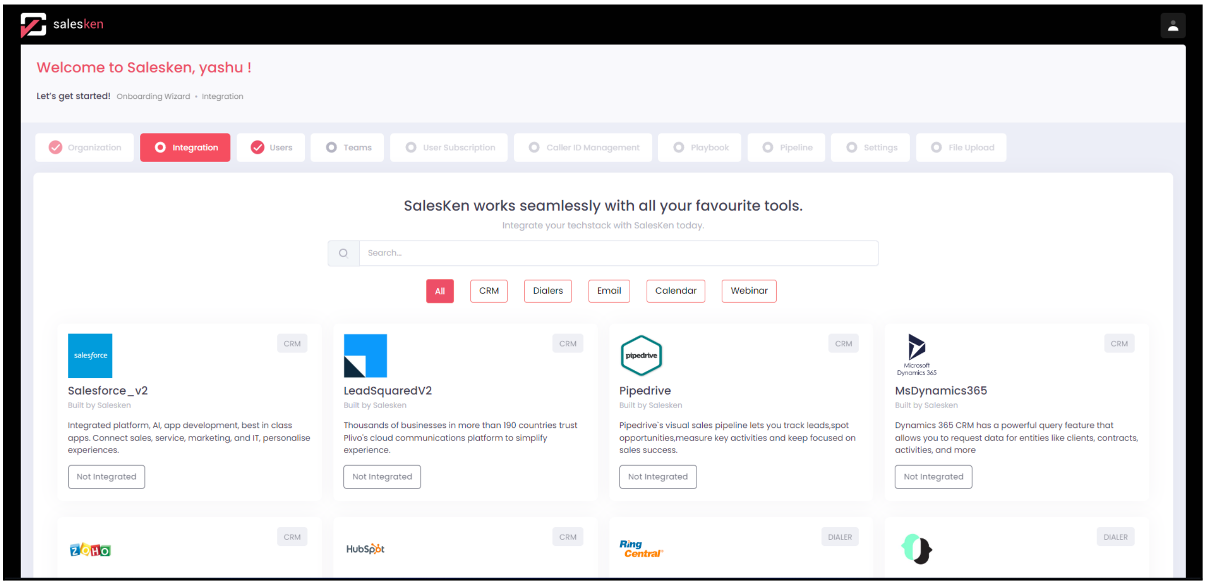
- Organization Name
- Organization Website
- Contact Name
- Contact Number
- Organization Type
- Industry of your organization
- Contact Email



Integration:

The integration combines the data or services from several platforms and makes them more valuable to your organization. We integrate with the following class of products to be able to embed deeply into the business process of our partners.

Integrations are segmented based on their functionality and services such as,



1) CRM Integration:

Salesken's integration framework enables all CRM data, such as accounts, contacts, and opportunities, to be integrated with sales conversations and acts as a system of action through analytical insights

By integrating your CRM with Salesken, we would achieve the following:

- Pull data:
    1. Lead information
    2. Pipeline/stage details
    3. Win/loss data of leads
    4. Import Users
- Push data:
    1. Call recordings
    2. Duration of the calls
    3. Status of the calls (e.g. Answered, Failed, Busy, etc…)

How does this improve your experience on the Salesken platform?

- Ability to view activity log with respect to leads
- Conversational analytics on Lead/Opportunity
- Aggregated conversations of leads
- Customer interaction gap (intelligence reports)
- Forecast the revenue with conversational insight and identify actual closing deals

- Identify the conversations which led to deal closure and help train the team based on the good call

To avoid the friction and pain of changing their workflows, we provide an option to sync data from their existing CRM to Salesken and vice versa.

Integration Feature:

Integration can be customized based on use cases:

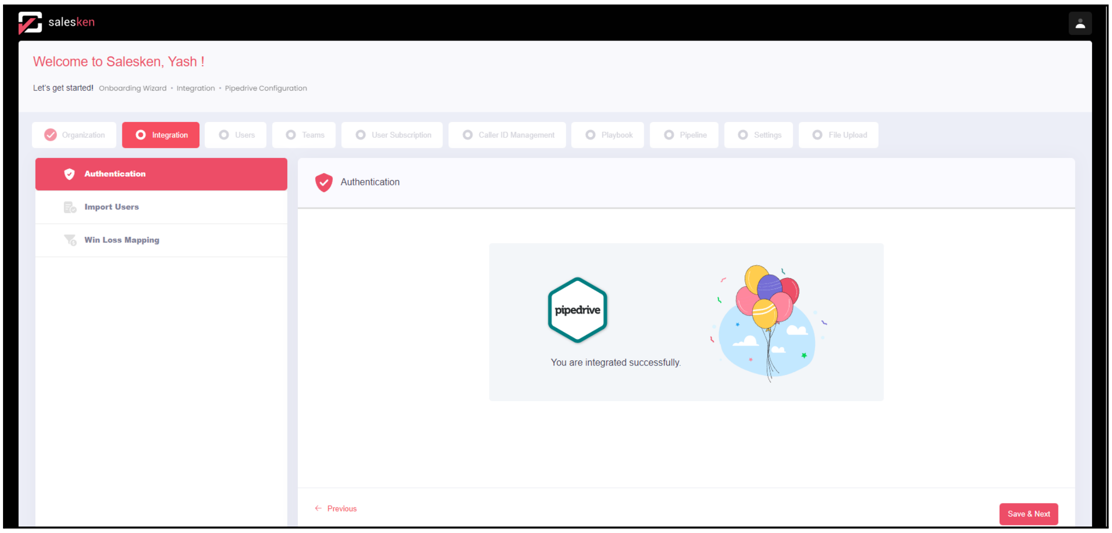
1. Data can be configured through an entity mapping interface as data objects/fields are different in the CRM & Salesken. Depending on the use case, different entities can be mapped, such as leads, opportunities, and contacts
2. Revenue & leads stage mapping to give you insights to forecast actually closing deals.
3. Task mapping interface helps you to push call/meeting details to CRM and this interface helps you to configure which fields (timestamp, call duration, etc..) to be pushed in CRM
4. Conversation information like call summary, call duration and audio URL can also be pushed to CRM

→ To integrate PipeDrive with Salesken the admin should follow these steps,

a) **Authorization:**

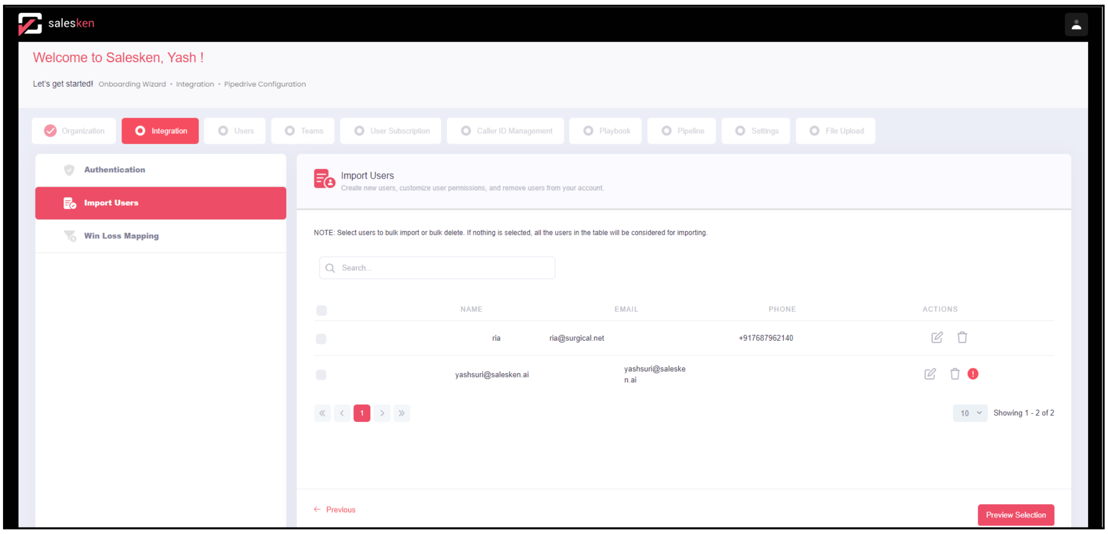
- Click on the “**PipeDrive**” card, the user will be redirected to the authorization screen
- Select the “**Click**” button highlighted in green color

- The user will be redirected to the authorization page on PipeDrive
- Upon successful integration, this screen will be displayed to the user

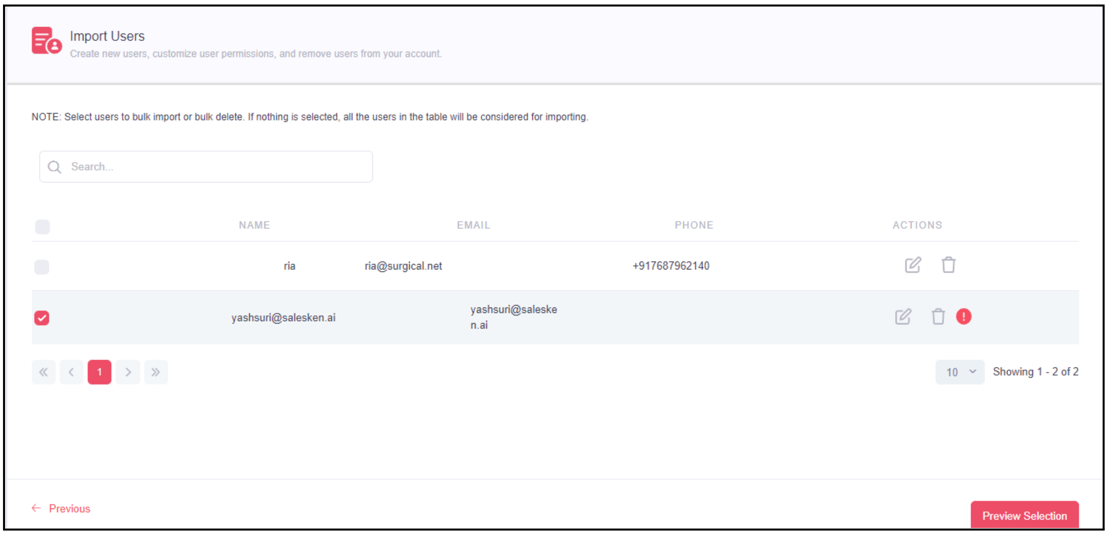


b) Import User:

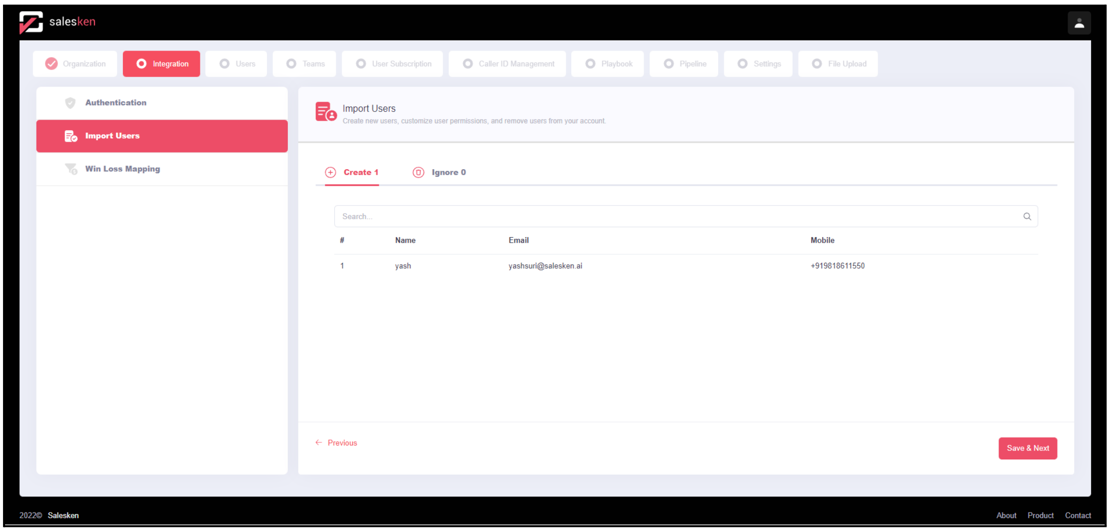
- After authorization, the admin will be redirected to the **import user** page



- All the existing users in the organization will be displayed on this page
- The admin can select the users they wish to import by ticking the “**Checkbox**”



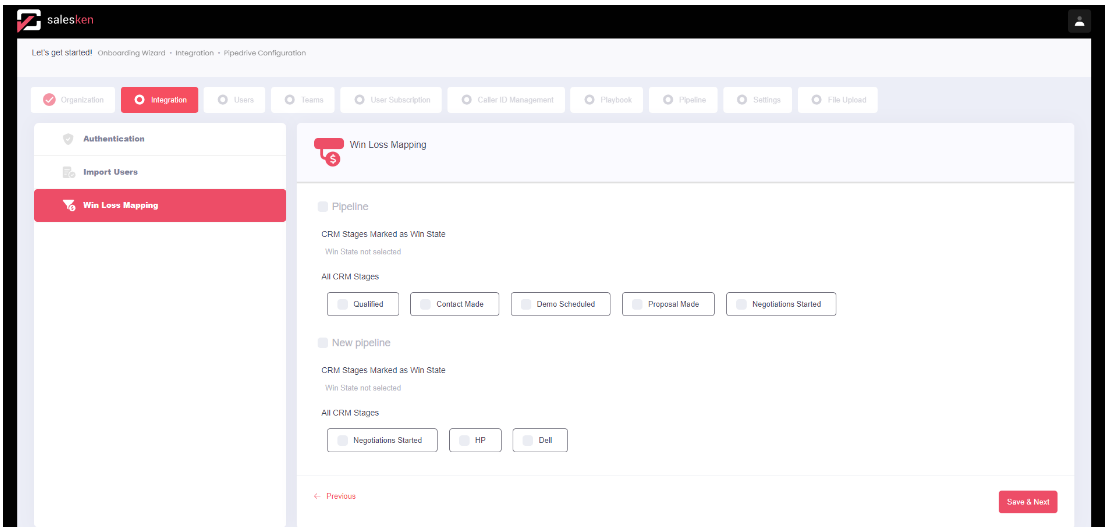
- Click on the "**Preview selection**" to access the details of the users to be imported



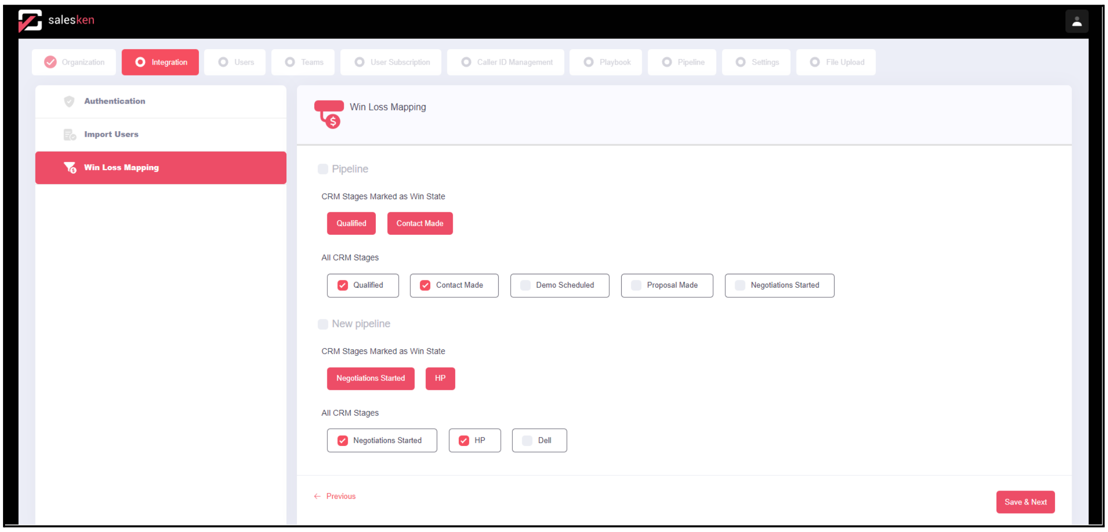
- Click on "**Save & Next**" button

c) Win - Loss Mapping:

- The admin can map the tasks that are won or lost on this page

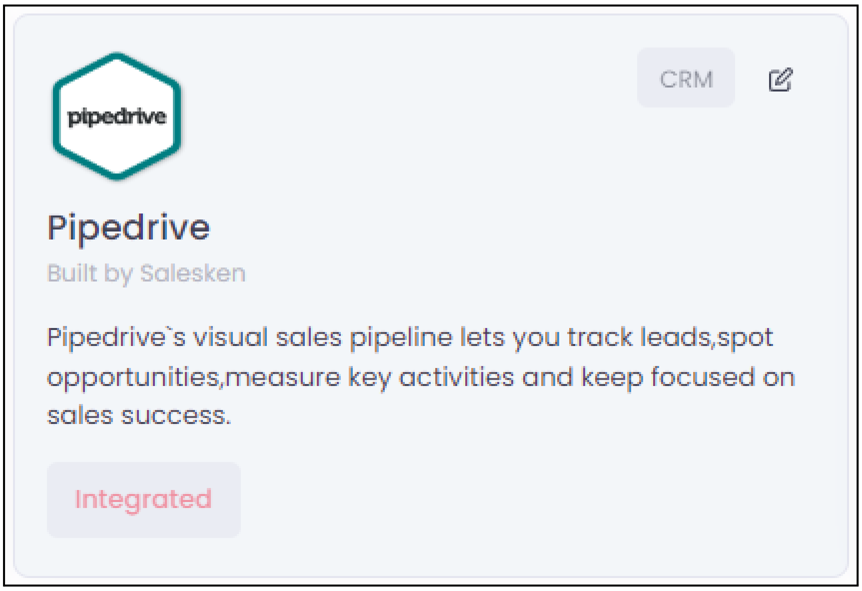


- The user will be given an option to mark all the stages of a pipeline as win/lost. Please note that all the won stages are the stages which will have lead/led to revenue.



- After all the stages have been marked as won/lost click → "**Save & Next**"

Upon completing all the required steps, the CRM - Pipedrive will be successfully integrated with the Salesken and its card will appear like this:



2) Dialer Integration:

JustCall is a dialer where reps can make or receive calls and JustCall stores all the call details made from its platform. Integration with Dialer allows you to connect all your call information to Salesken.

Integrate JustCall with Salesken to capture and analyze sales conversations. Collect all of your call recordings in Salesken to obtain transcripts and insights from every customer interaction.

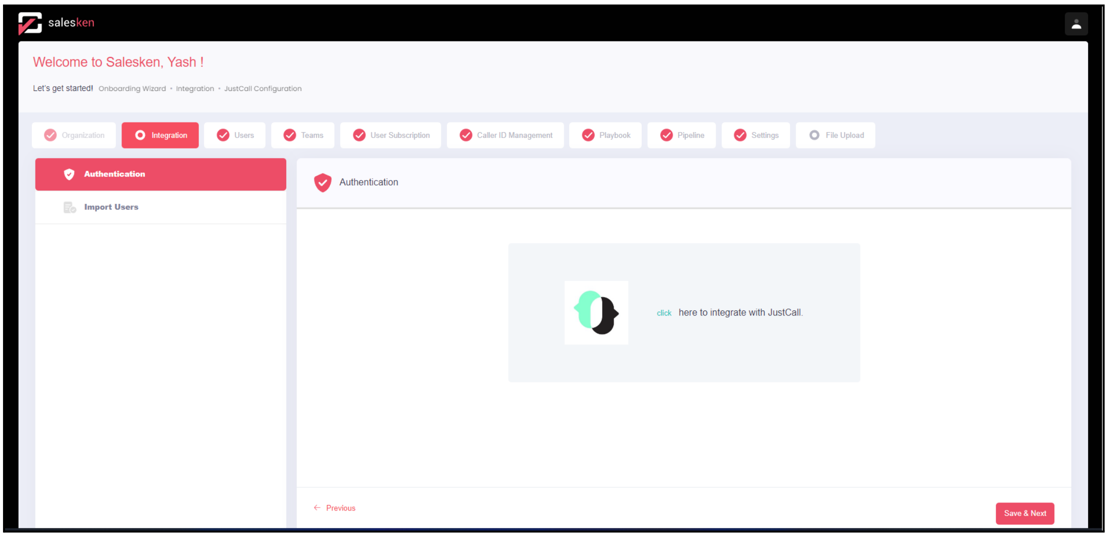
Salesken helps you with what your reps are doing differently over the phone: what questions they're asking, how they're discussing, what their talk ratio is, where your competitor was mentioned, or make sure your reps are following the deals winning sales script. And help you solve the conversational challenges and win the deals with insights into these conversations in real-time and post-call.

Easily share sales calls with customers or internally. Ask for feedback, tag team members to get them involved, and pinpoint areas for improvement. Encourage team collaboration and help reps win more deals together.

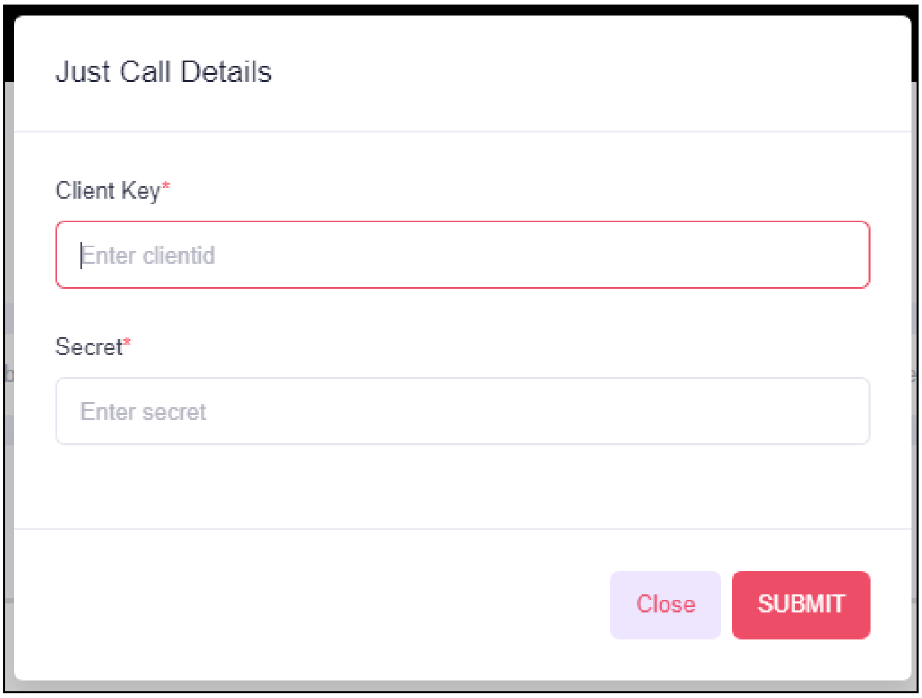
→ To integrate Juscall with Salesken the admin should follow these steps,

a) Authorization:

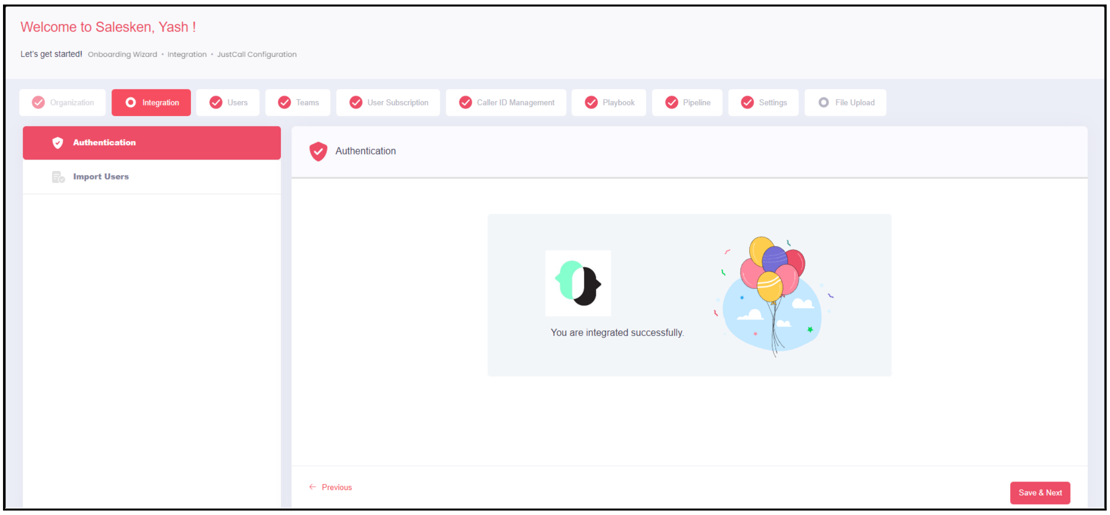
- Click on the “**Juscall**” card, the user will be redirected to this screen:



- Select the "**Click**" button highlighted in green color
- The user will be prompted to provide following details
- Ask your JustCall admin to give you the credentials, which can be filled in the JustCall Integration details.



- After providing the appropriate credentials, Juscall will be successfully integrated with Salesken, the user can verify this on the following screen:

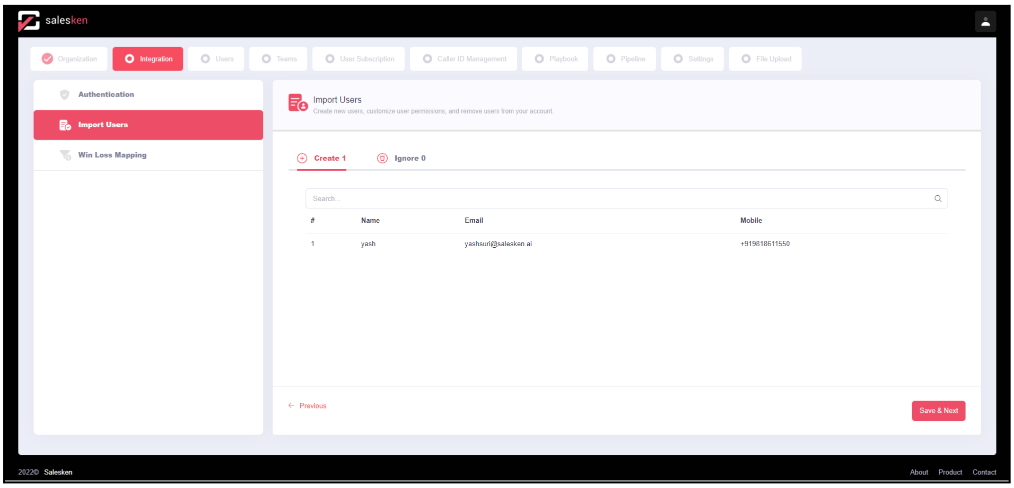


b) Import Users:

The admin can directly import the users in the organization onto the Salesken portal by using the "Import Users" feature on the onboarding wizard

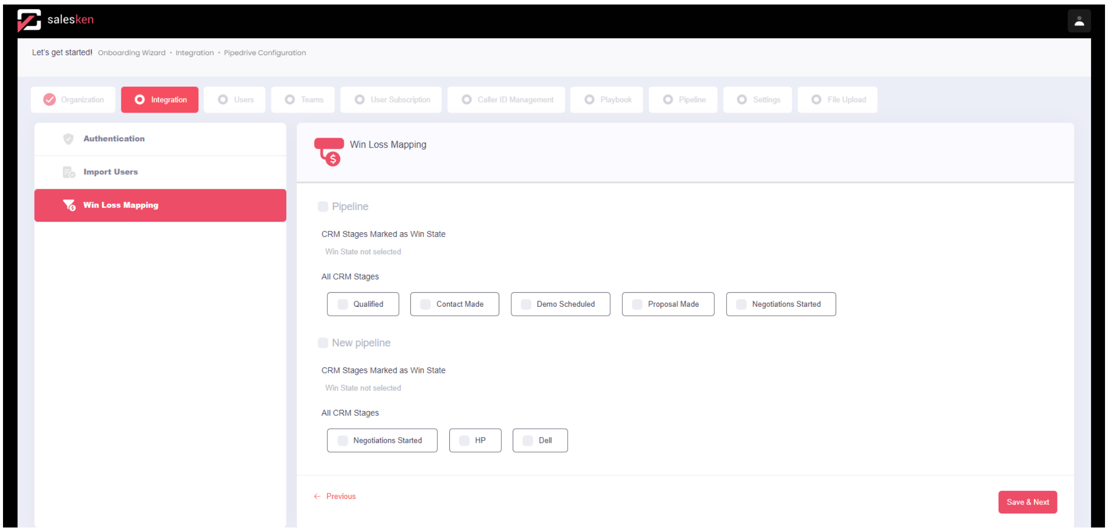
To import users the admin should follow these steps,

- Click on the "**import user button"** on the left menu toolbar
- All the existing numbers will be displayed to the admin
- Select the users that are to be imported by ticking the "**checkbox**"

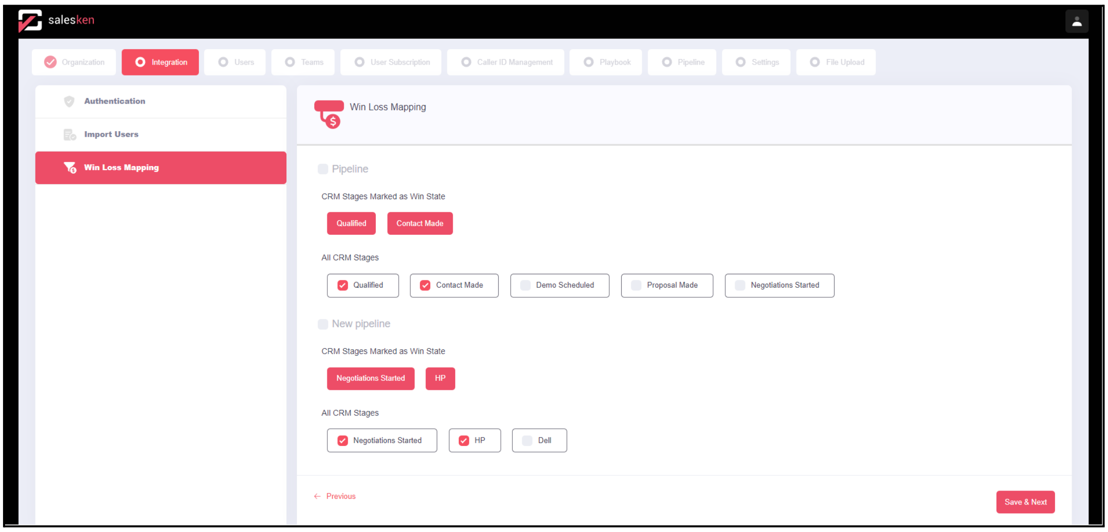


c) Win Loss Mapping:

- The admin can map the tasks that are won or lost on this page

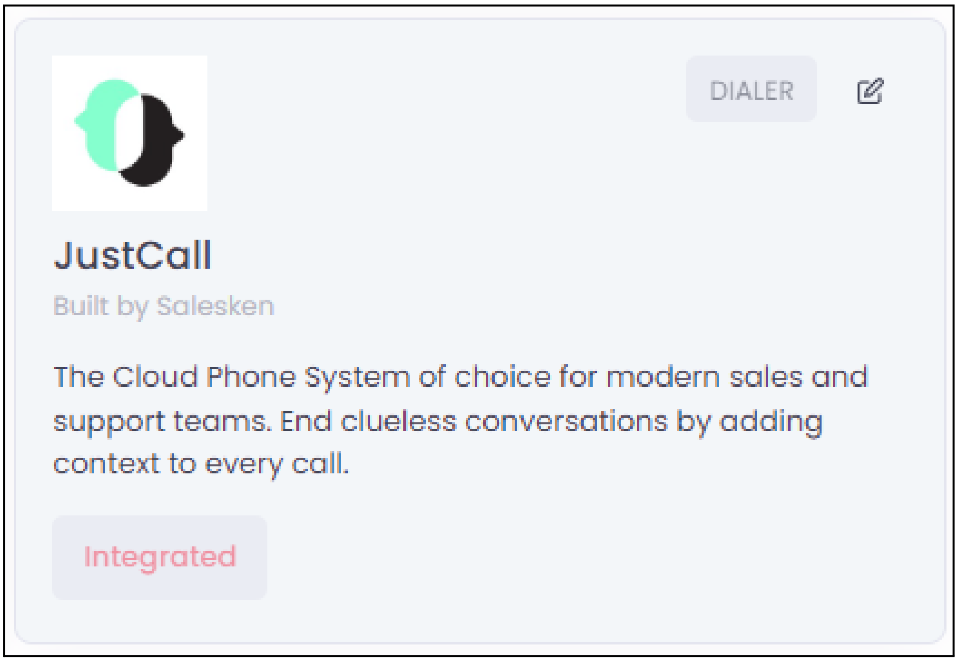


- The user will be given an option to mark all the stages of a pipeline as win/lost. Please note that all the won stages are the stages which will have lead/led to revenue.



- After all the stages have been marked as won/lost click → “**Save & Next**”

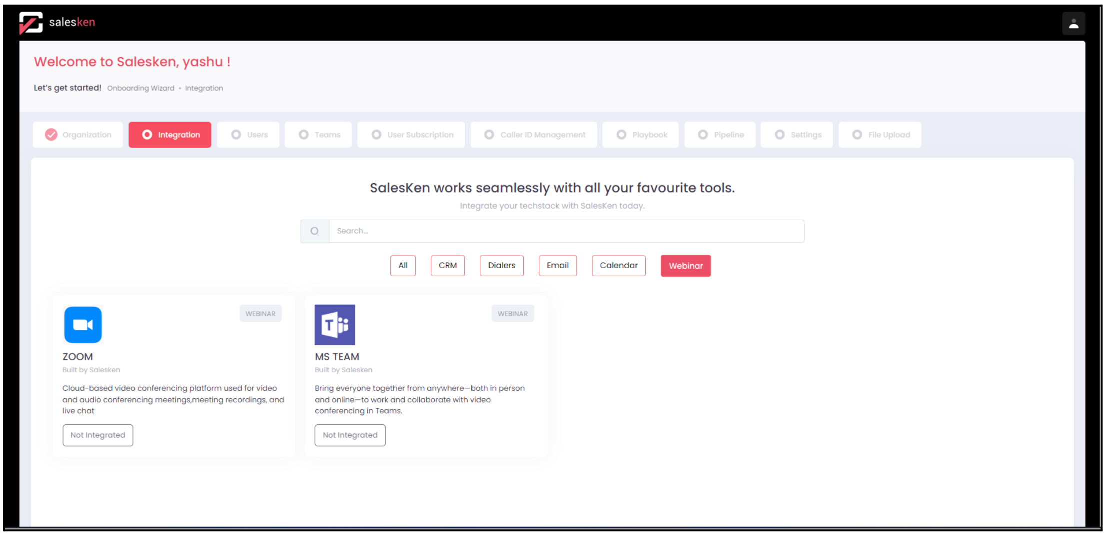
Upon completing all the required steps, the Dialer - JustCall will be successfully integrated with the Salesken and its card will appear like this:



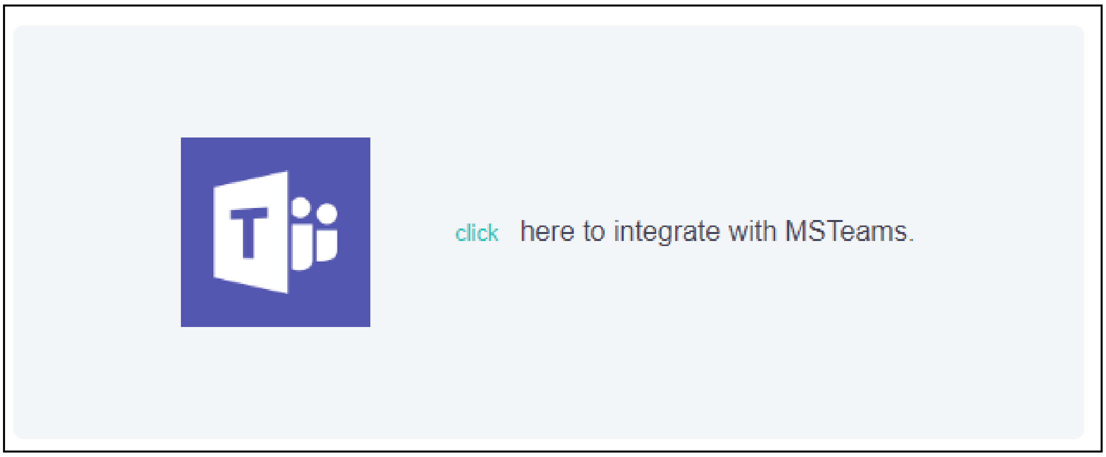
3) Webinar:

The Admin can integrate MS Teams with the Salesken by following these steps,

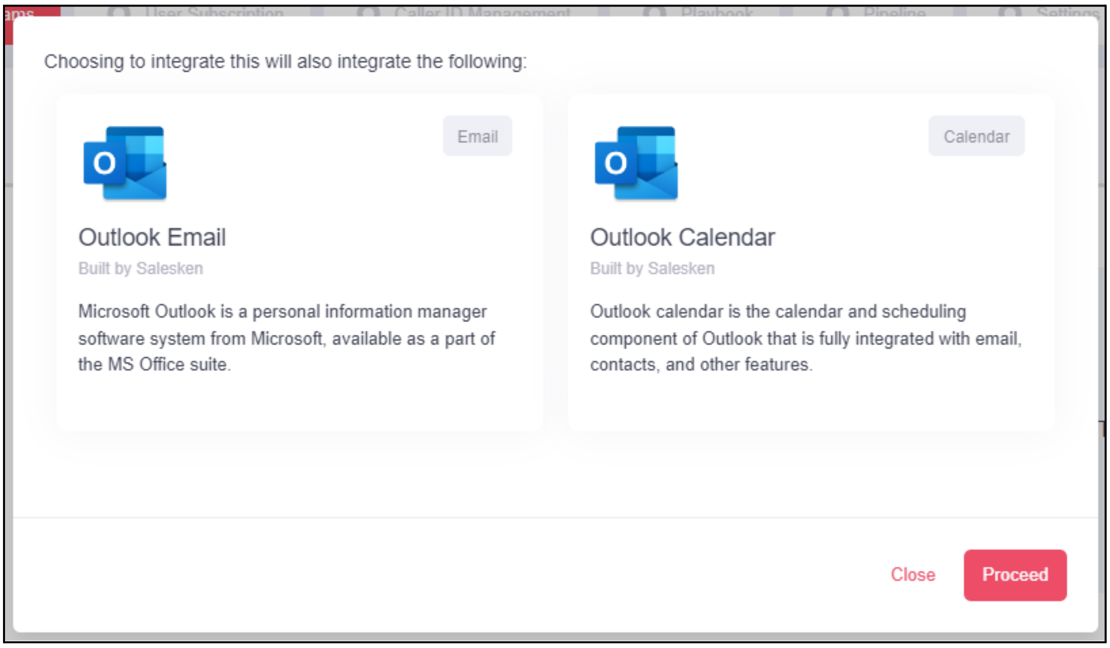
- Navigate to the Webinar page on the Onboarding Wizard
- The admin can access all the webinar tools that can be integrated with the Salesken



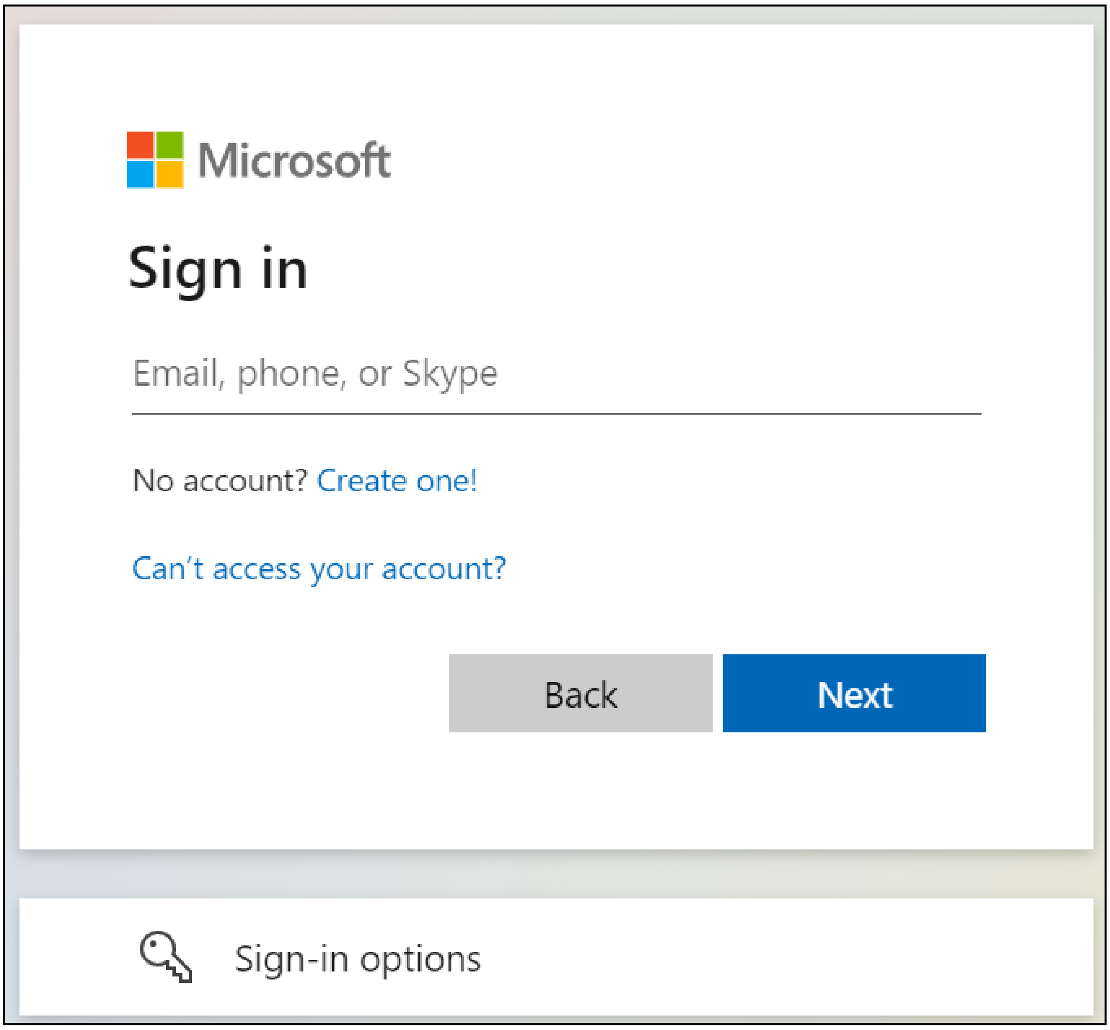
- Click on the "**MS Teams**" card, the user will be redirected to the MS Teams authorization page
- Click on the "**Click**" button highlighted in green color



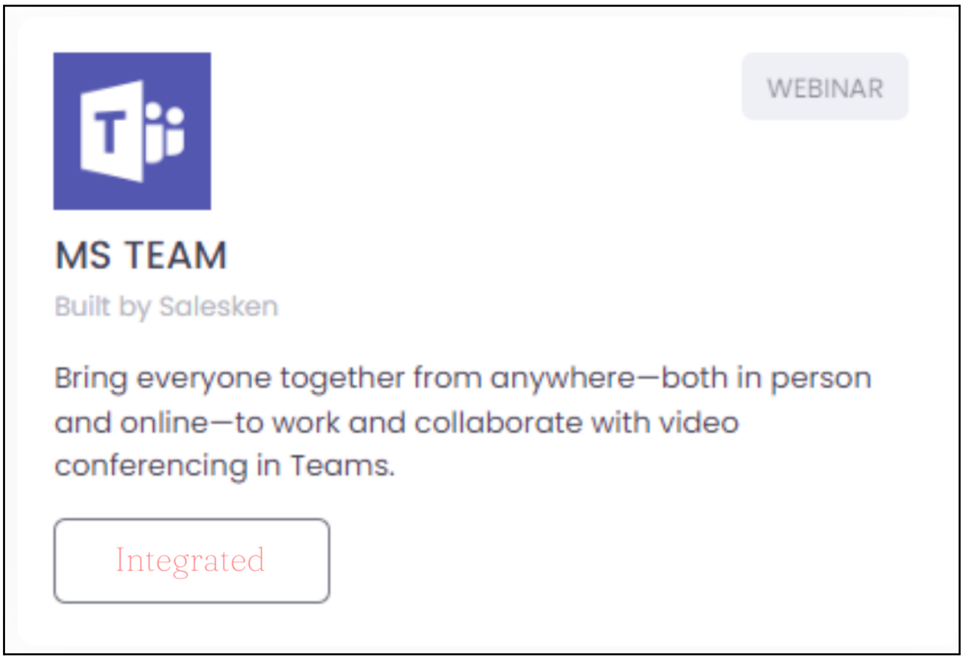
- A pop-up will appear, click on “**Proceed**”



- Login using valid credentials



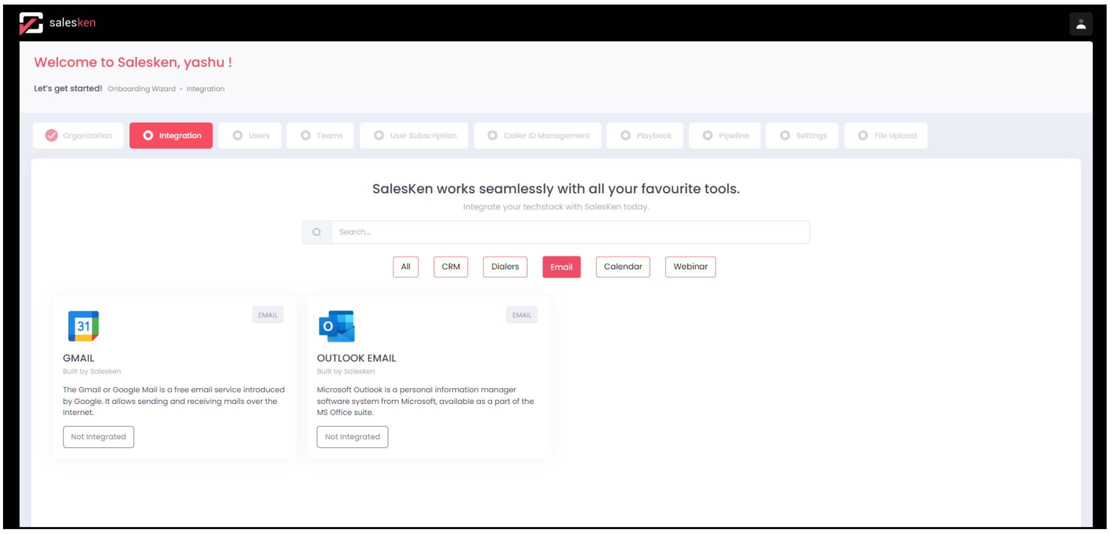
- Upon successful integration the MS Teams card will look like this



4) Email:

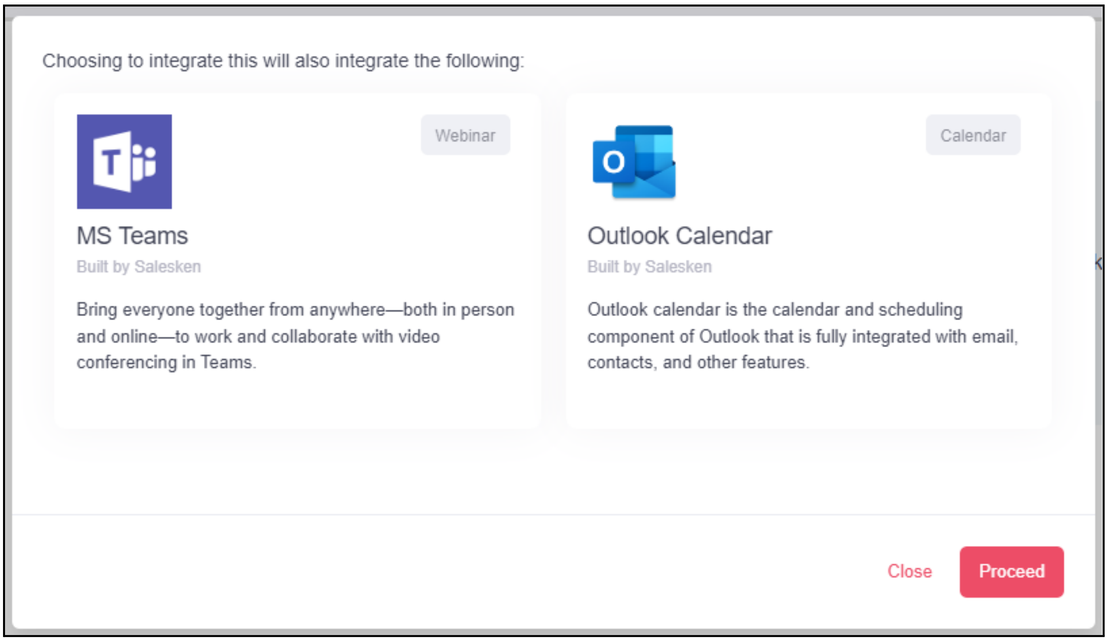
The Admin can integrate their Outlook Email account with the Salesken by following these steps,

- Navigate to the Email page on the Onboarding Wizard
- The admin can access all the email tools that can be integrated with the Salesken

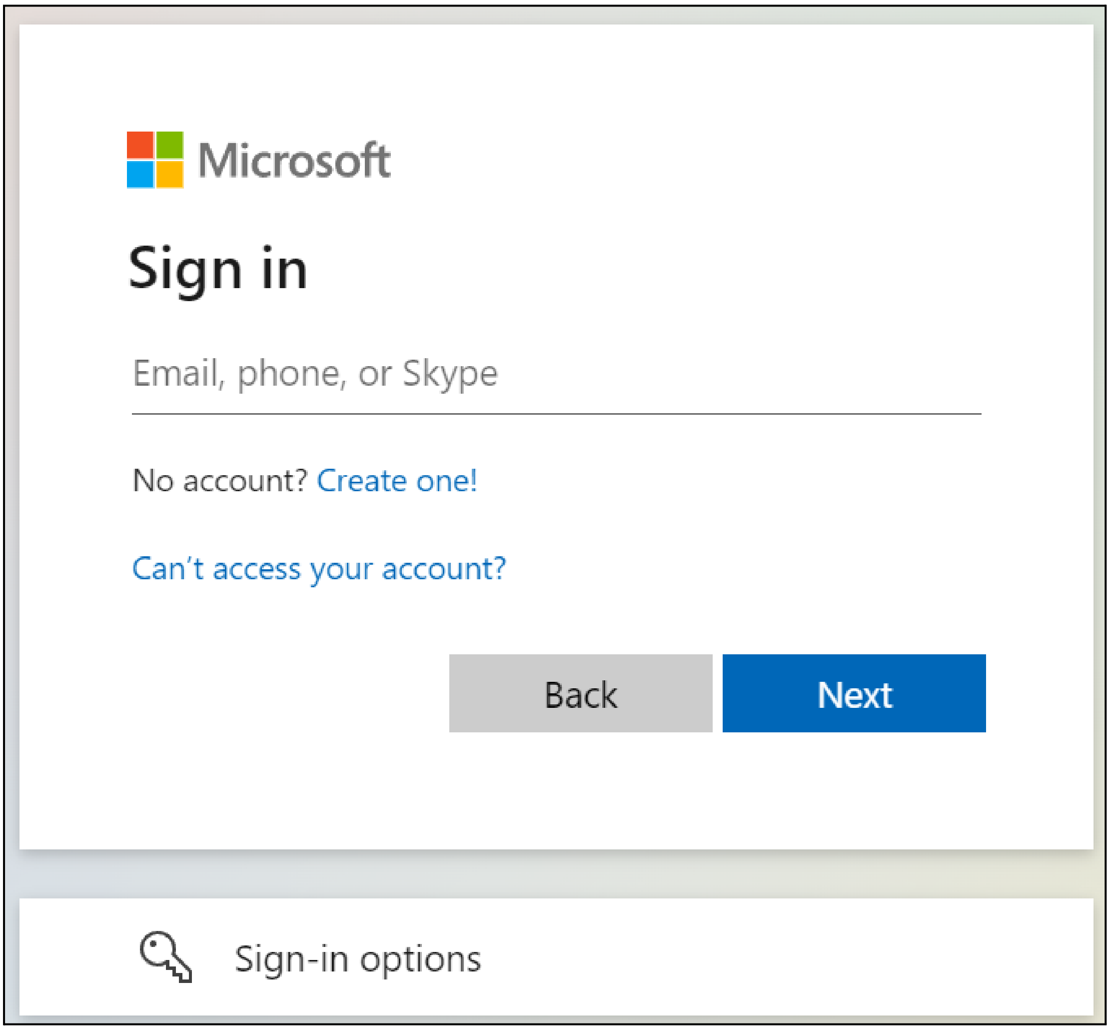


- Click on the "**Outlook**" card, the user will be redirected to the Outlook authorization page
- Click on the "**Click**" button highlighted in green color

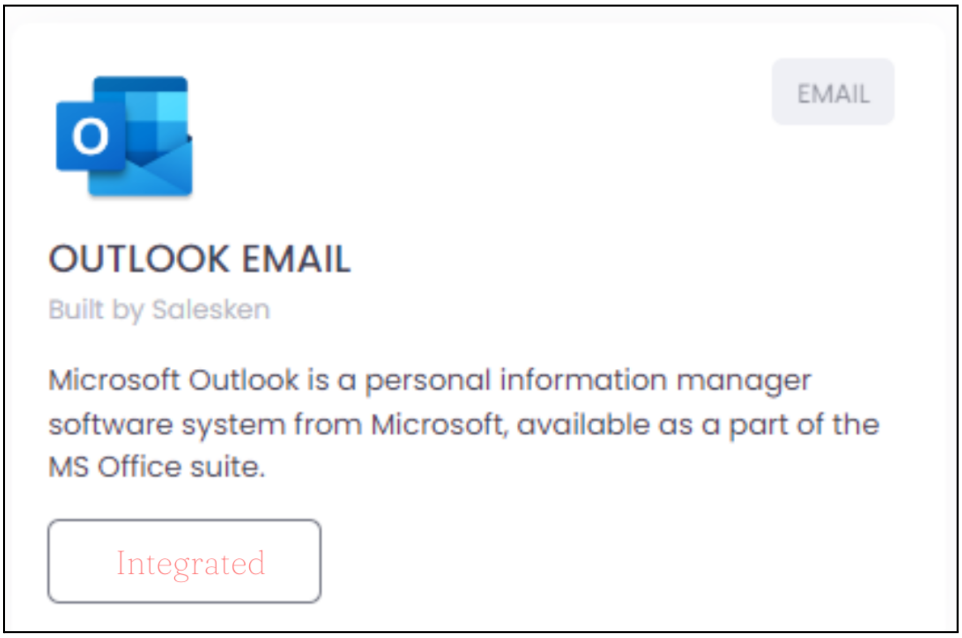
- A pop-up will appear, Click on "**proceed**"



- Login using valid credentials



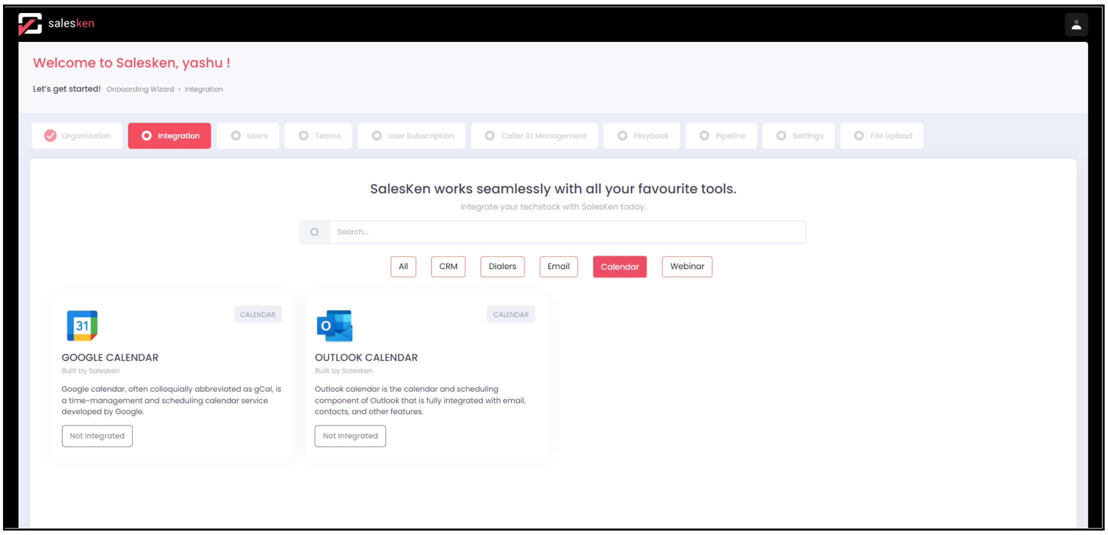
- Upon successful integration the Outlook card will look like this



5) Calendar:

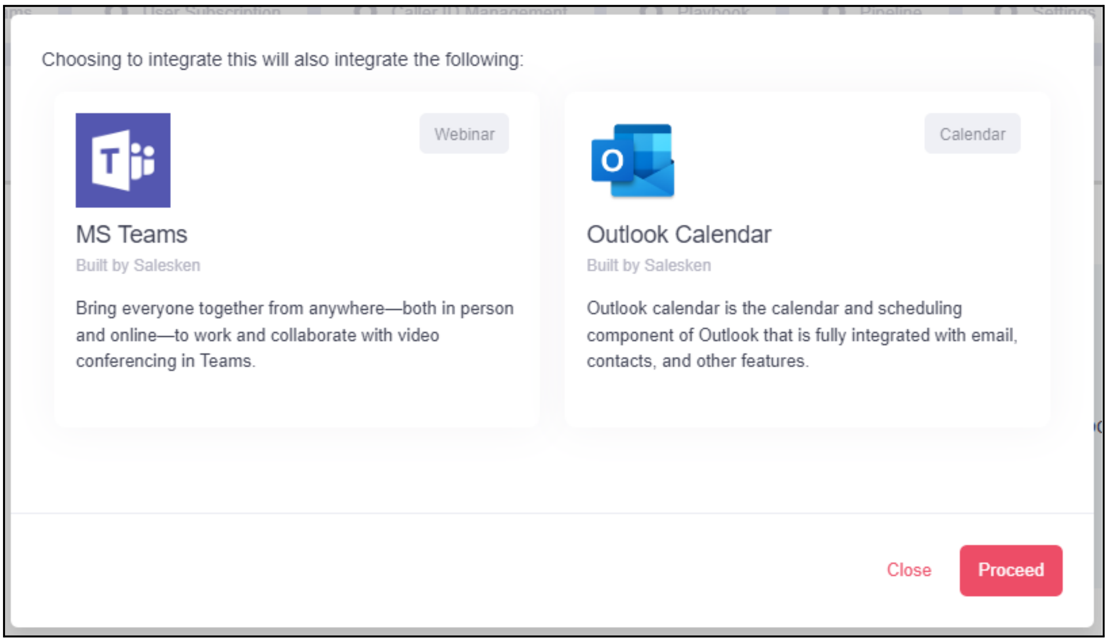
The Admin can integrate their Outlook Calendar with the Salesken to access the meetings directly from the Calendar by following these steps,

- Navigate to the Calendar page on the Onboarding Wizard
- The admin can access all the calendar tools that can be integrated with the Salesken

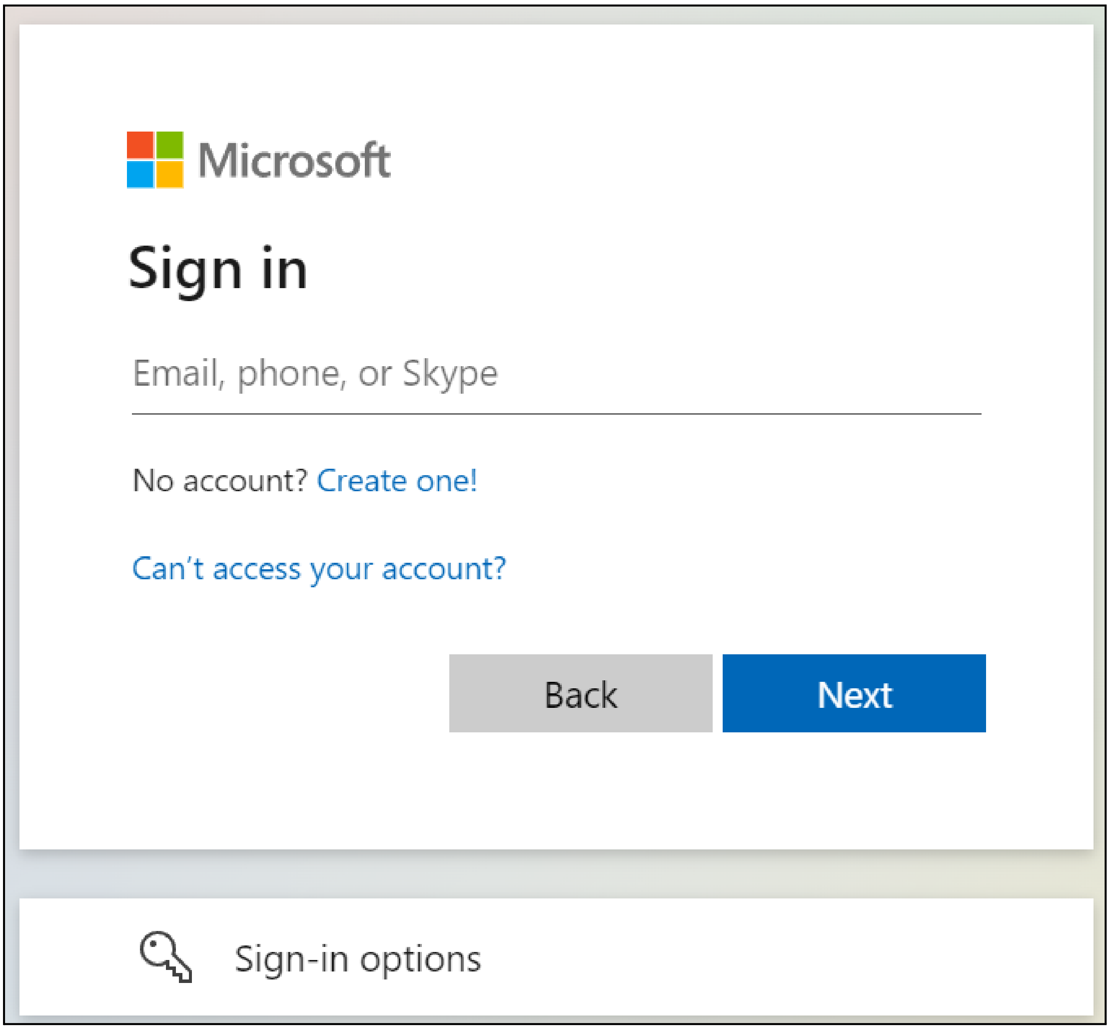


- Click on the "**Outlook**" card, the user will be redirected to the Outlook Calendar authorization page
- Click on the "**Click**" button highlighted in green color

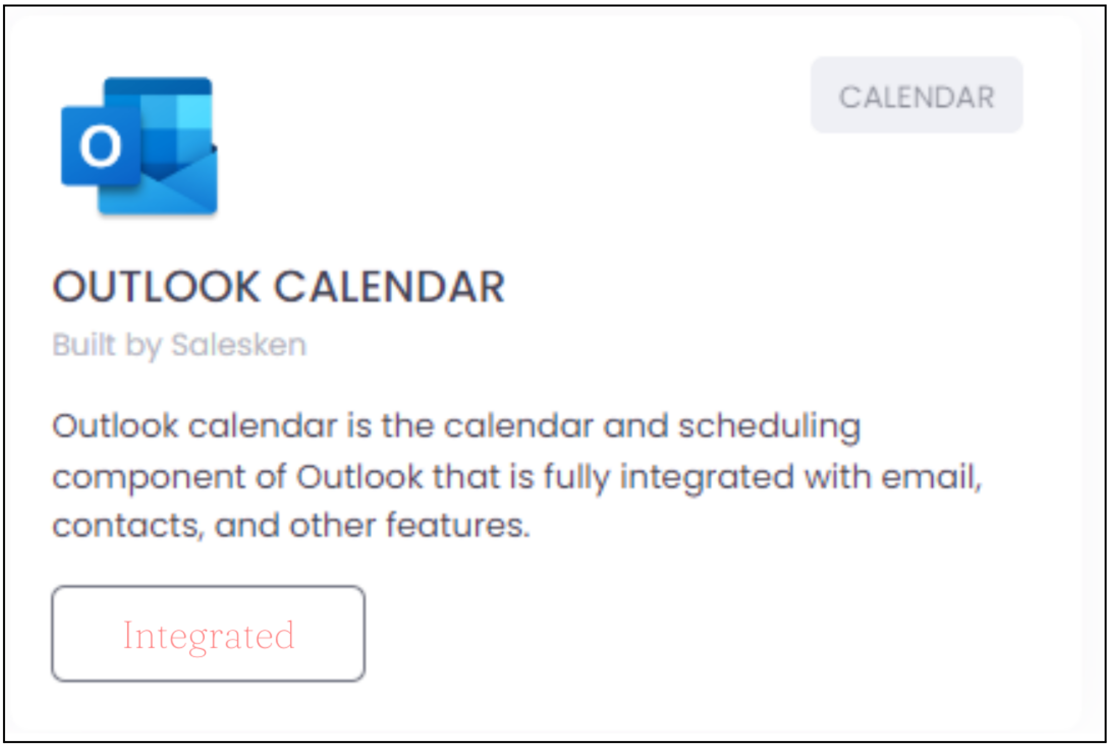
- A pop-up will appear, click on “**proceed**”



- Login using valid credentials



- Upon successful integration the Outlook Calendar card will look like this

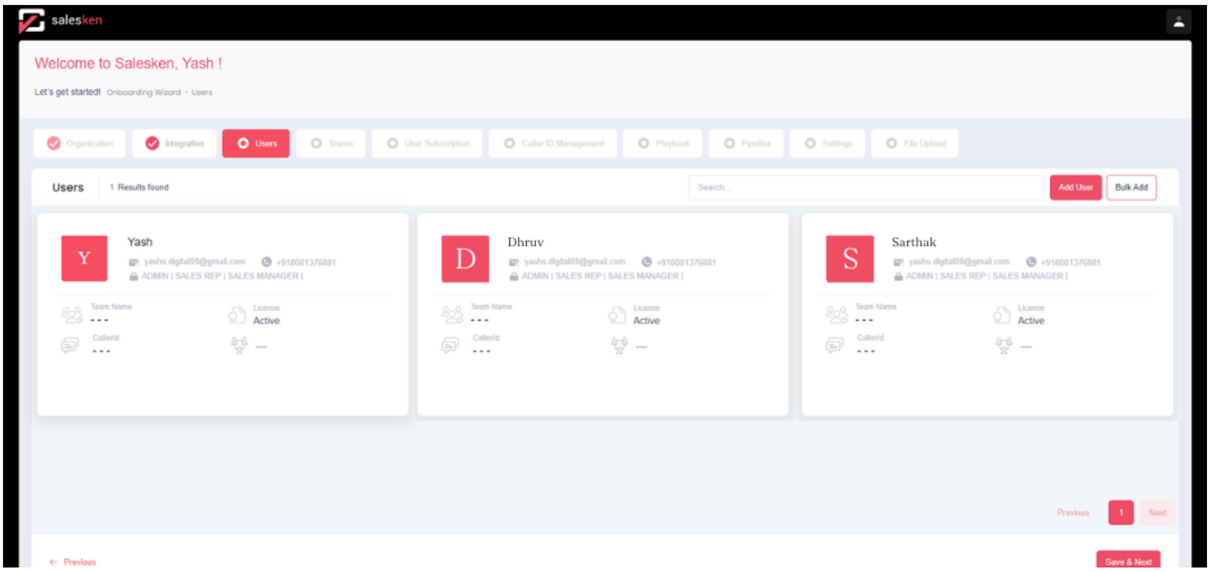


Users:

This feature enables the "**Admin**" to manage all the users in the organization easily. In the list on the user page, you can view and manage all the user details.

Note: The users imported by the admin for the CRM or the Dialler will also be displayed on this page

1. **Add User:** Create or add a single user to the organization
2. **Bulk Add:** Upload multiple users at once to the organization

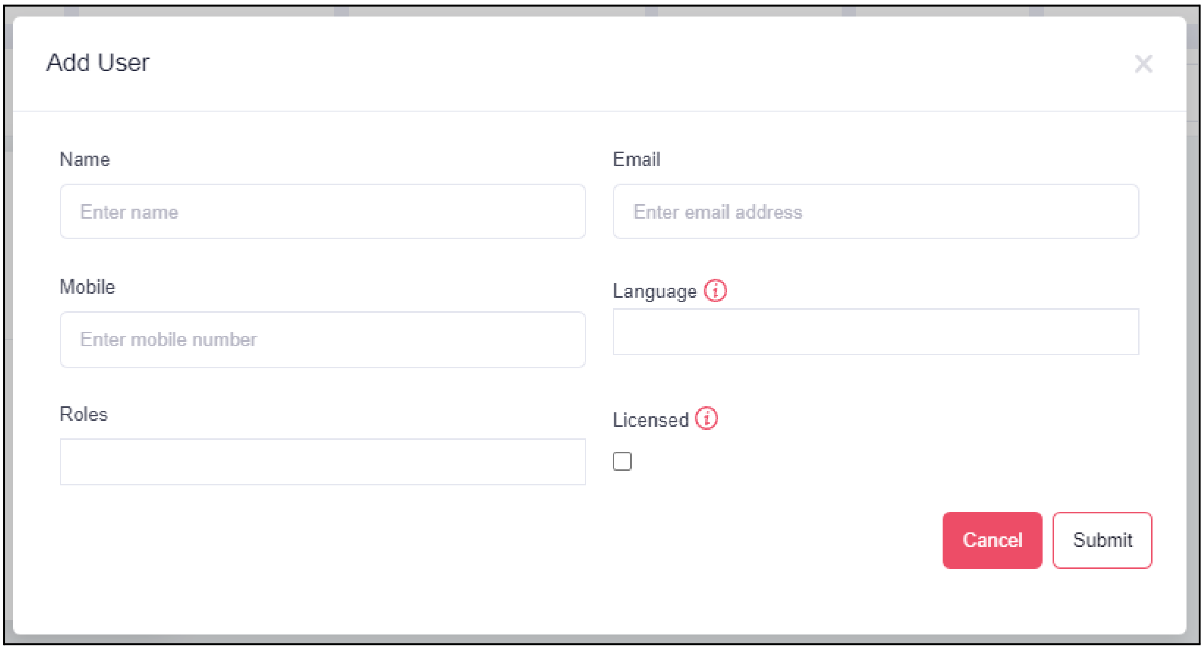


Depending on your preference, you can add one user at a time. For example, if your company hired a new employee, you must add a single user:

- Click “**Add user**”.
- Enter the user's “**Name, Email, and Phone number**”.
- Set the new user's role in the Role list from:
    - **Sales Rep:** Sales representative is responsible for selling the product/services to the customer. Their primary role is to convince the customers.
    - **Sales Manager:** Sales manager is responsible for managing a specific number of sales representatives. They are responsible for assigning the taks and review the performance of the respective sales rep
    - **Admin:** An admin is responsible for managing the organization as a whole. They have several sales managers assigned under them and they assign them the tasks.

  (You can also assign multiple roles to a single user)

- In the language list, select the “**language**” that the user understands.
- Tick the checkbox if the user is licensed.
- Click the “**Submit**” button.



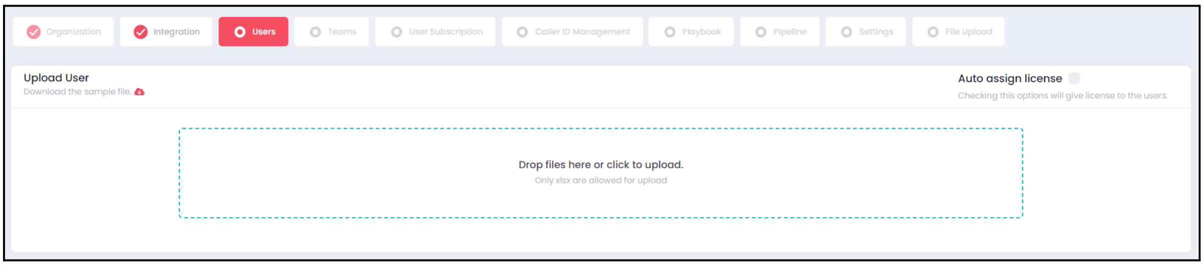
Prerequisites to Bulk Add:

Column names are mandatory- You must enter column names in the excel file.

Refer to the sample .xlsx file that you can download by clicking on the Download sample file button to get information about the columns that should be there in the excel file:

1. Name
2. Email Address
3. Mobile Number (with country code) - Required
4. Role – Enter the role that you intend to assign to the user.
5. Support file format .xlsx

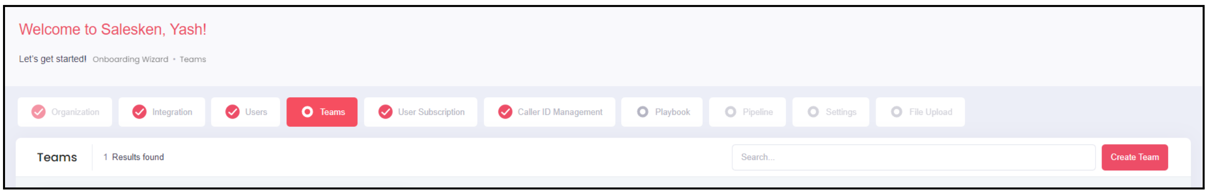
If you check the auto-assign license checkbox, all the users in the file will become licensed users automatically after being added to the organization.



Teams:

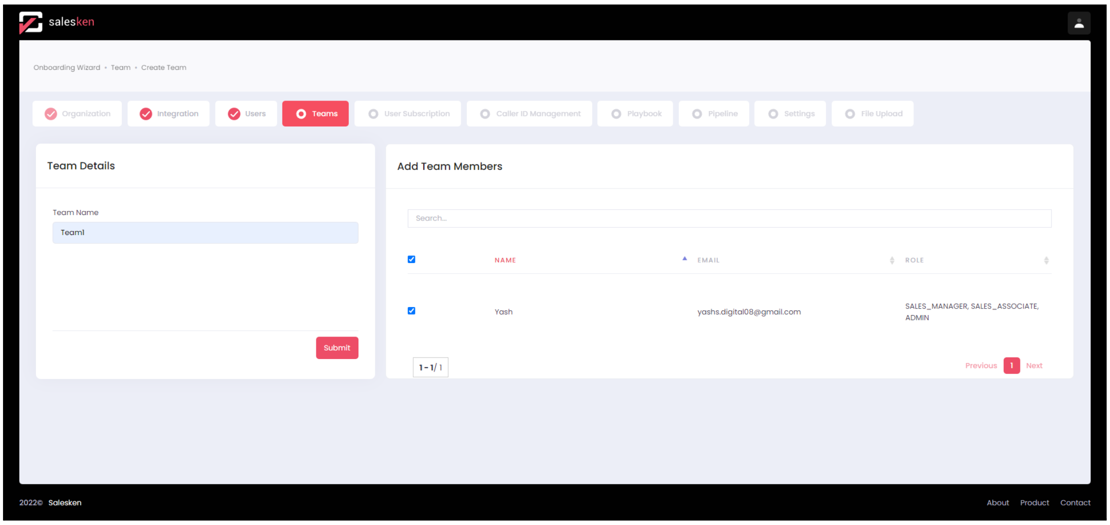
A sales team is a group of people who sell a company's product or service to leads and customers. They are in charge of meeting the company's growth objectives by selling products, services, or subscriptions.

The admin can create teams for their organization as per their requirement during the onboarding process itself.



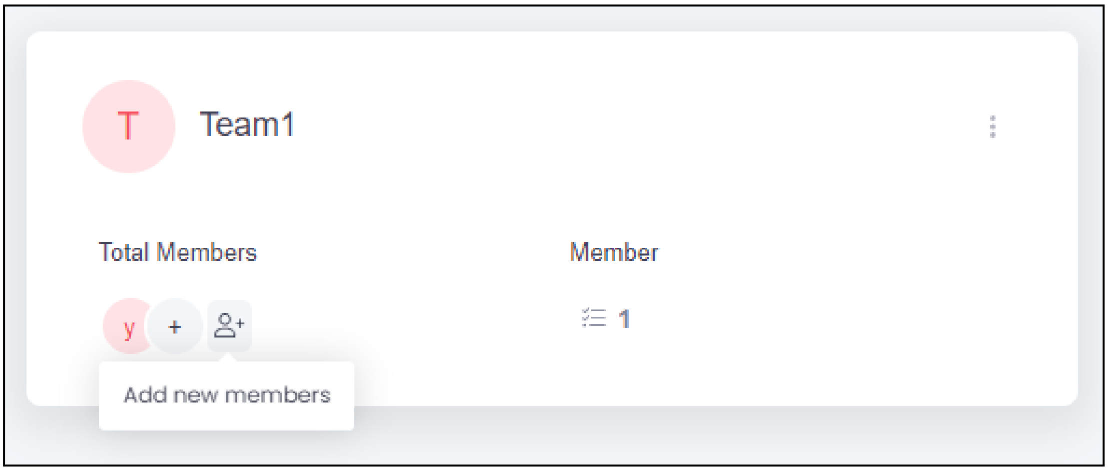
1) Create Team:

- Click the “Create Team” button from the “Teams” page
- Enter the “Team Name”
- In “Add Team Members”, enter the member's name in the search field and select the checkbox
- Repeat for each team member.
- Click “Submit”



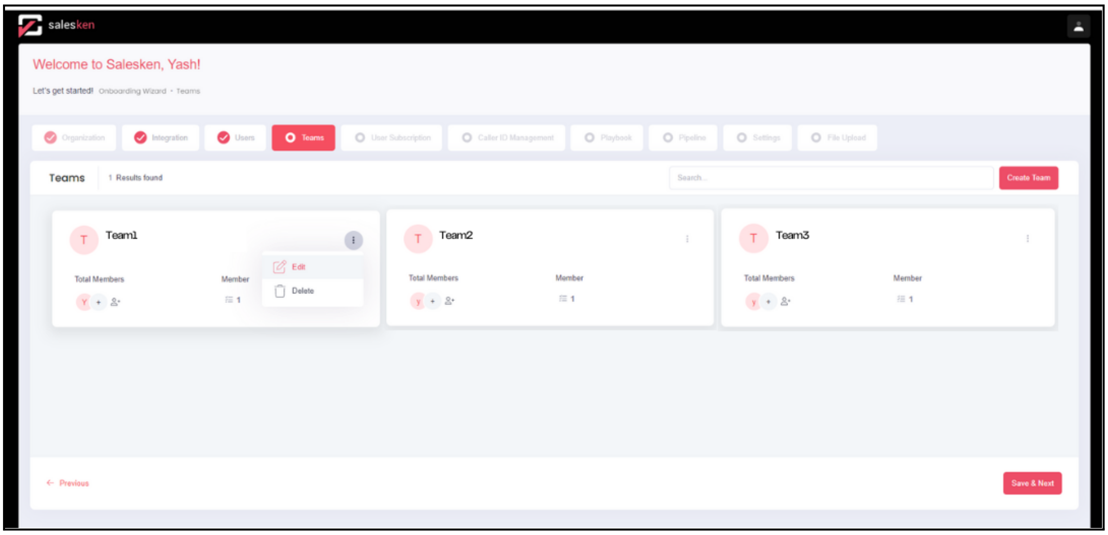
2) Add Members:

- Click the “Add New Members” button under the “Total Members” section on the team card.
- Enter the names of the user in the search field, select the checkbox and then click “Add Member”.

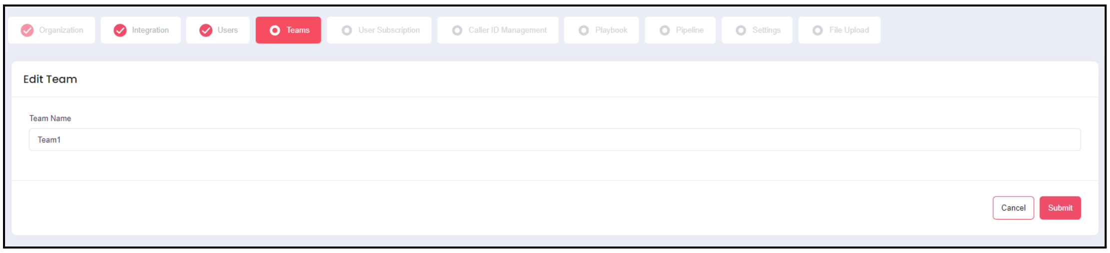


3) Edit Team:

- Find the team which you want to edit, Click the action button
- Select ”Edit”

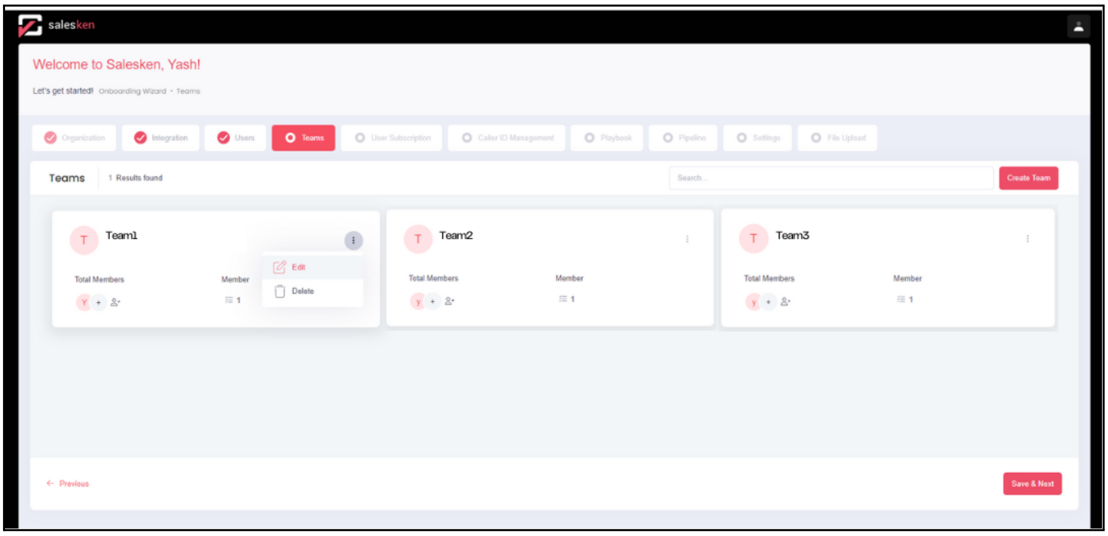


- Edit the Team Name
- Click “Submit” to save your changes



4) Delete Team:

- Find the team which you want to Delete, Click the action button
- Select ”Delete”



User Subscription:

A Salesken user with a manager role can subscribe to the user/team to view the reports and analytics insights, as well as the activities and actions taken by those users/teams.

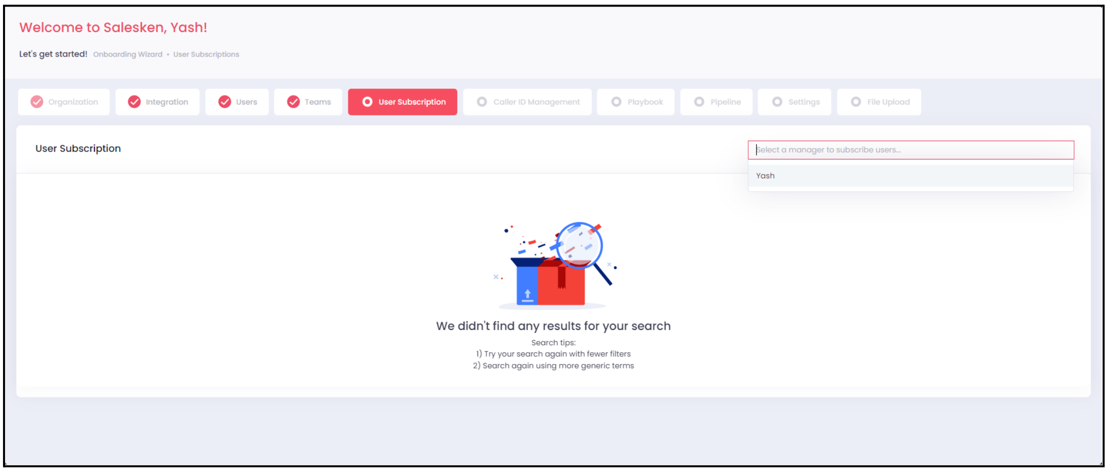
When you subscribe to a user/team, any new activities and actions performed will appear on the manager's dashboard, and you can view the analytics for the subscribed users/team.
The admin can configure the subscription for the user with the manager role on Salesken using user subscription. Admin can update/configure the subscription based on the user hierarchy for whom the subscription is configured.

There are two types of subscription that can be managed by the admin:

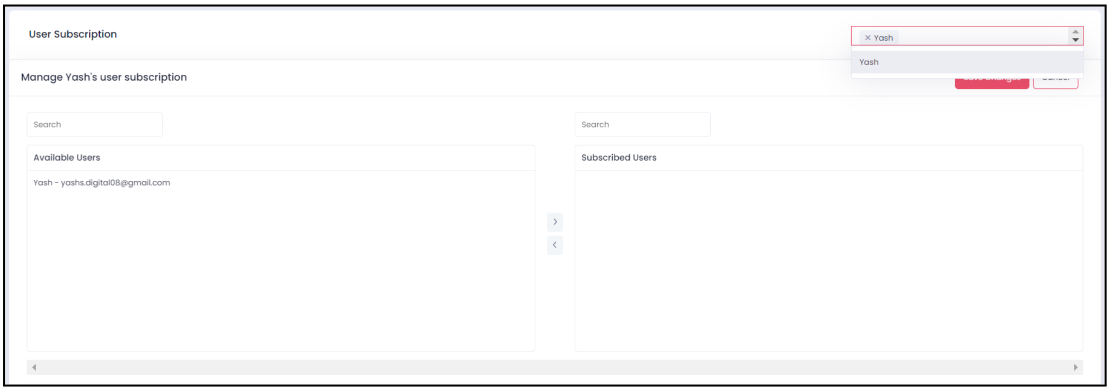
A) User Subscription:

By user subscription, Admin allows the manager to subscribe/unsubscribe to a single or all the users available at once. The respective Manager can see the available users and their subscribed users.

- In this search field, Admin can search for a specific user to subscribe/unsubscribe to that particular user.



- Then you can subscribe/unsubscribe to a particular user.
- You can also click on the “Add All” button to add all the users in the organization as subscribed users for that Sales Manager.
- You can also click on the “Remove All” button to remove all the users in the organization from the Sales Manager subscription.

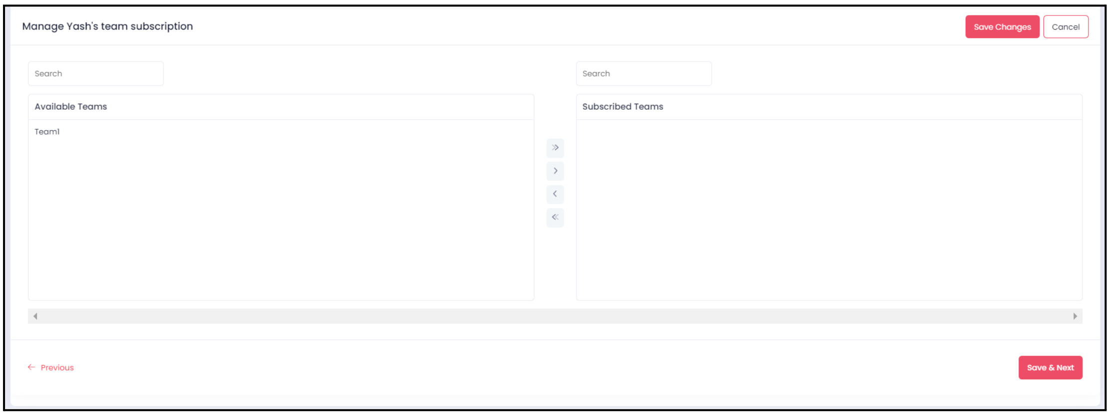


- You can also double-click on any user in the Available Users column to turn them into Subscribed Users for that Sales Manager.
- You can also double-click on any user in the Subscribed Users column to remove them from the Subscribed Users for that Sales Manager.

B) **Teams Subscription:**

By team subscription, the Admin can subscribe to a single or entire team at one time. Each manager can see the available teams and their subscribed teams.

- In this search field, Admin can search for a particular team to subscribe/unsubscribe to that particular team.
- Then you can subscribe/unsubscribe to a particular team.
- You can also double-click on any team in the Available Teams column to turn it into a Subscribed Team for that Sales Manager.
- You can also double-click on any user in the Subscribed Teams column to remove it from the Subscribed Teams for that Sales Manager.

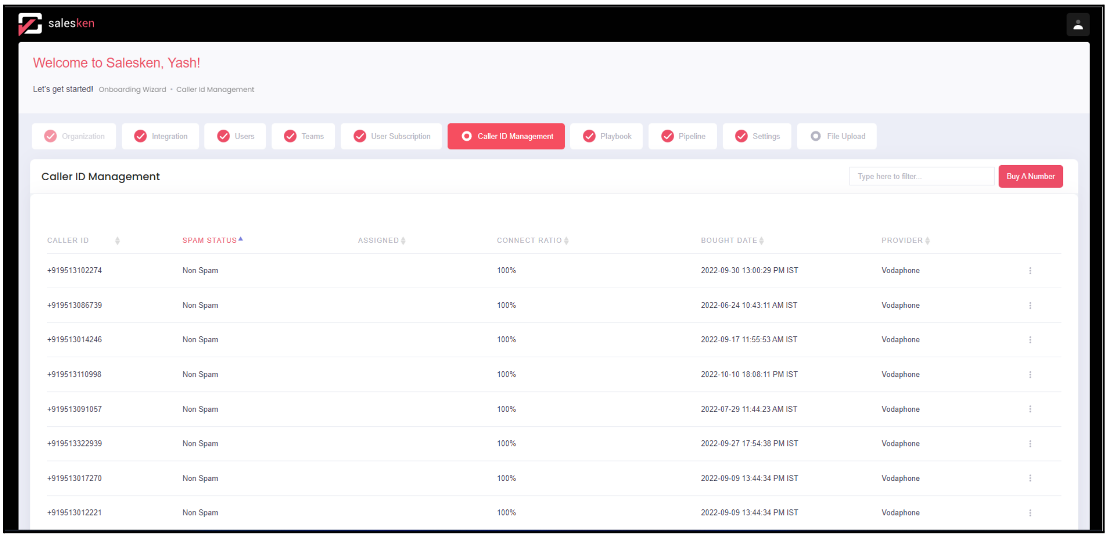


Caller ID Management:

Caller Id is a virtual number that is assigned to a user with a Sales rep role on Salesken and the user would be placing calls via Salesken. Callerid is the virtual number that gets displayed to the customer(customer of the user) when they receive the call from the user.
 It is a unique number assigned to each user based on the geographical location of them making a call. Caller-id can be a virtual number that resembles a mobile number or a landline number of a particular geographical location. A user can have one or multiple caller-ids assigned to them.

On this page, you can manage the caller ids for your organization.

- You can see the list of all the available caller Ids in your organization, including the ones that have been assigned to the users in your organization.
- You can assign/ reassign the caller Ids to different users in your organization.



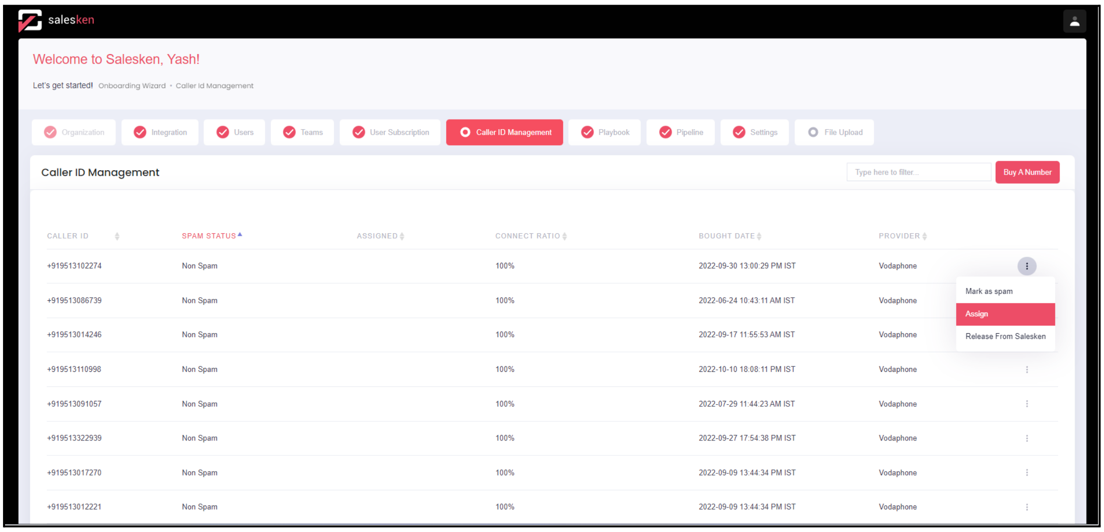
→ On the page you can see the following information about each caller Id:

1. **Spam Status:** this shows if a caller Id is Spam, Likely Spam, or Non-Spam.
    a. **Spam-** If the calls made by a particular caller Id are not getting connected 90% of the time, then we declare that number as spam
    b. **Likely Spam-** If the calls made by a particular caller Id are not getting connected 70% of the time, then we declare that number as likely spam
    c. **Non-Spam-** If the calls made by a particular caller Id are not getting connected for less than 70% of the time, then we declare that number as non-spam
2. **Assigned:** This shows which user in the organization has been assigned that caller Id
3. **Connect Ratio:** This shows the percentage of connects that happen for that particular caller Id
4. **Bought Date:** Shows the date and time when you bought that particular caller Id for your organization

5. **Provider:** Shows the provider that provides that particular Caller Id

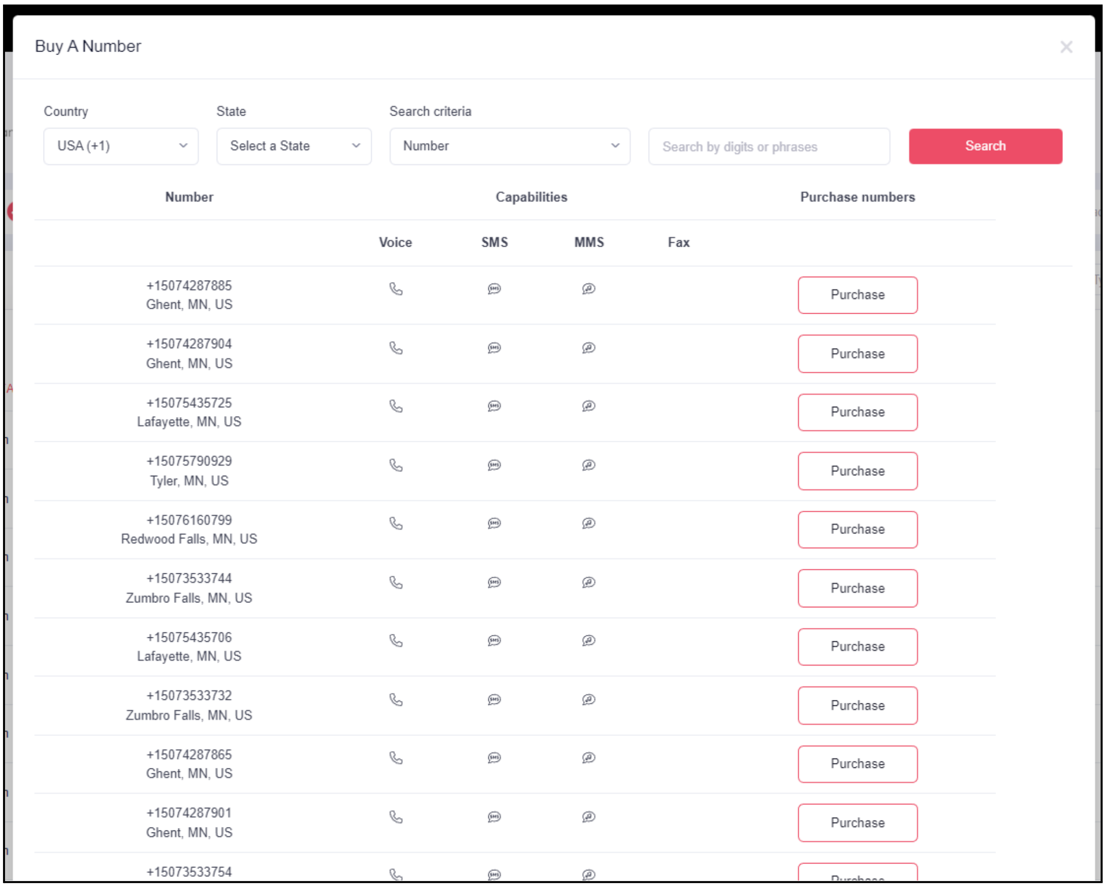
→ **On the Caller Id Management Page, you have the following features:**

1. **Search Bar:** You can search for any specific user
2. **Buy a Number:** You can buy any number you want for your organization
3. **Mark As Spam:** You can mark a number as Spam
4. **Assign:** If the caller Id has not been assigned to anyone then you can assign it to any user in your organization
5. **Release From Salesken:** You can release a caller Id from Salesken and it won't be assigned to anyone and you can reuse it later

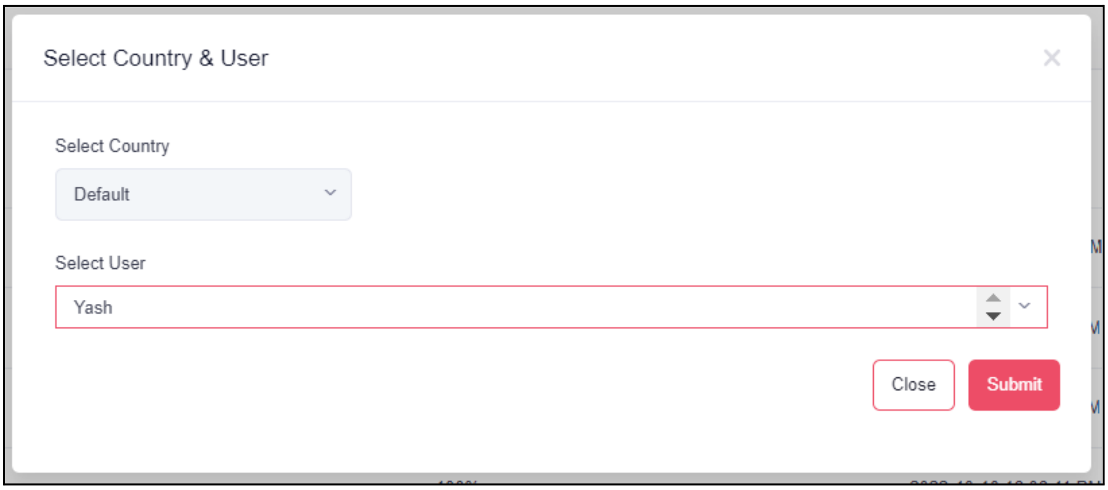


Buy A Number:

- Click the **"Buy A Number"** button at the top right of the screen.



- Select your "**Country**" and "**State**" from the drop-down list.
- In the "**Search by digits or phrases**" field, enter the number you wish to purchase.
- Click the "**PURCHASE**" button for the desired caller id from the search results.
- You will get a confirmation once the number is purchased Successfully, then click "**OK**".

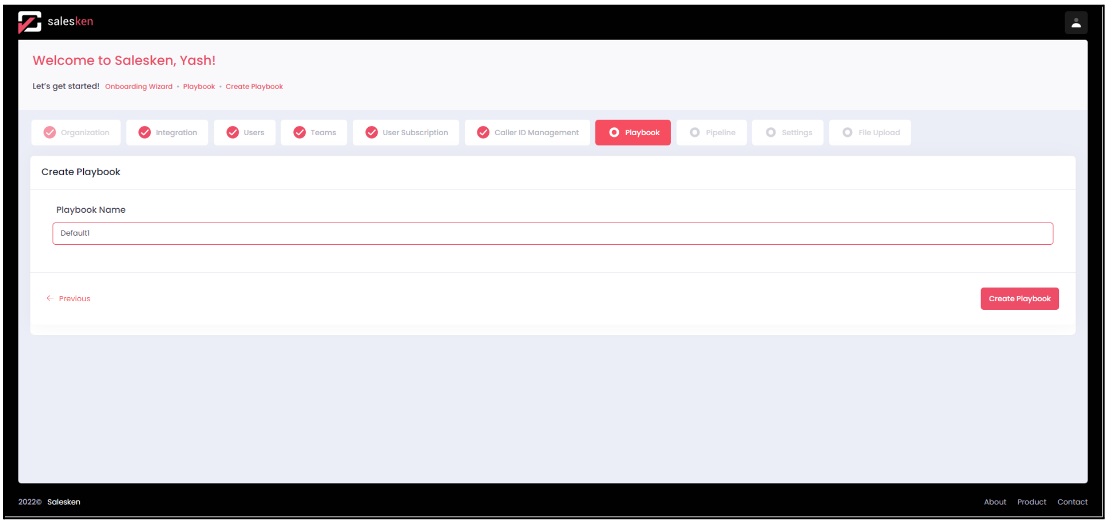


Playbook:

The playbook is a feature that provides managers with a pie chart that displays the overall dimensions and signals covered by the sales reps with their leads within the organisation. This feature allows users to view how well the sales reps are covering the dimensions and its pre-defined signals while engaging with the leads in their conversations.

A) Create Playbook

- Click on the “**Create Playbook**” button in the top right corner.
- Enter the Name of the playbook in the Name field.



- Click on “**Create Playbook**”.

Playbook card provides the Admin with following details that are configured within it:

- Stage
- Signals

The Admin can edit, delete and configure the playbook, by clicking on the actions button on the top right corner of each Playbook Card.

B) Edit Playbook:

- Click on the actions button on the top right corner of the Playbook Card
- Click on “**Edit**”
- Admin can edit the playbook name on the Name field.
- Clicking on “**Update Playbook**” updates the changes made.

C) Delete Playbook:

- Navigate to the action button on the right side of the cue card
- Click on “**Delete**“ option
- A pop-up will appear
- Click on “**Confirm**“

The Playbook will be deleted upon clicking the confirm button

D) Configure Playbook:

The admin can add signals for the particular playbook by using the “configure playbook“ option. To add the signals the admin can choose between “**Add Signal**“ or “**Bulk Add**“

- Click on the action button on the right side of the cue card
- Click on “**Configure Playbook**“
- The user will be redirected to the following page:
- The admin can add signals by selecting either “**Add Signal**“ or “**Bulk Add**“

E) Add Signal:

- Upon clicking the Add Signal option a pop-up will appear

1) **Select the Dimension:** Admin can select/update the Dimension for the signal.
2) **Update the Signal Name:** Admin can add/update the signal name.
3) **Signal Value:** Admin can update the signal value.
4) **Generate Variations:** The admin can generate the variations for the signal values updated by them in the Signal Value column.
5) **Variations:** The admin can update the variation in the signals values so that the signals are captured during the conversations
6) **Signal Engine:** The admin can select/update the signal engine for the particular signal
7) **Time Constraint:** The admin can select/update the time constraint where the signal might be used by the sales rep during the conversation
8) **Speaker:** Select/ update the speaker of the signal

- After updating all the information click on “**Add Signal**”

F) Bulk Add:

- Upon clicking bull add option a pop-up will appear
- The admin can upload only the excel file with extension .xlsx to add signals in a bulk either by dropping the file in the space provided or by clicking to upload function

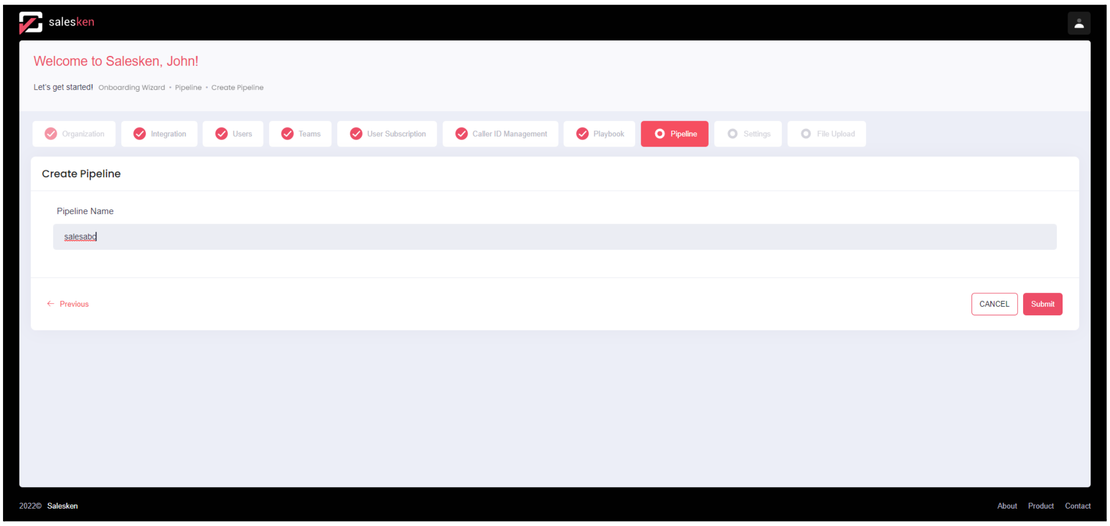
Pipeline:

A sales pipeline can assist you in visualizing the sales process. It will show you where all of your deals are in the sales funnel, where deals are stalling, and which sales activities are bringing the revenue most. Breaking the sales process down into small, trackable tasks, adds a layer of accountability and makes goals easier to achieve.
In other words, a pipeline is a sequential series of specialized modules or processes. It is a set of user-defined stages for a specific organization's product. Every sale's sales rep should adhere to the stages defined in their team's mapped pipeline based on the sales cycle. Pipelines have a few architectural stages, tasks, and leads that can be mapped to pipelines.

Create Pipeline

To create a pipeline the admin should follow these steps,

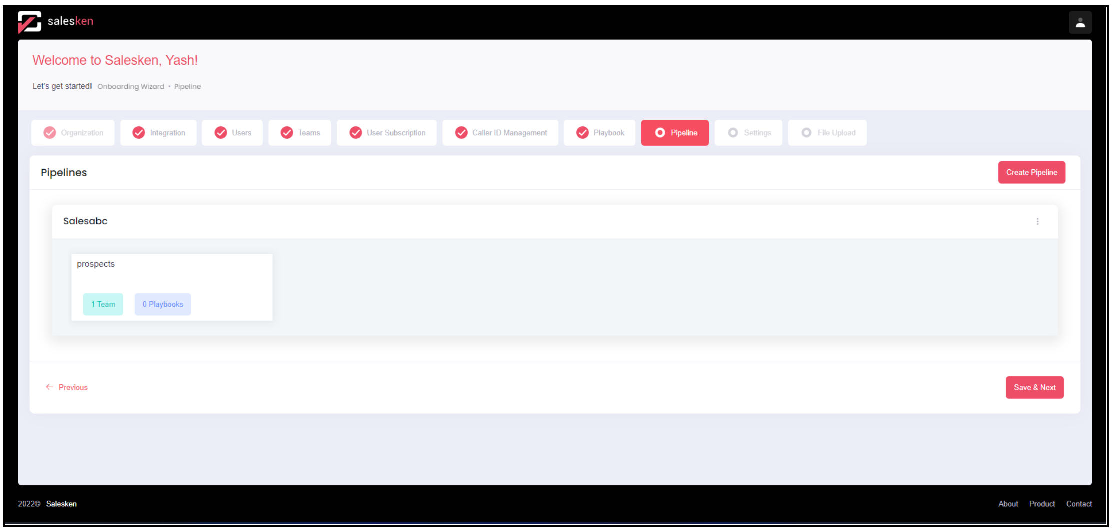
- Go to the "**Menu**" button and select the "**Pipeline**" option in the drop-down.
- Click the "**Create pipeline**" option on the top-right side of the screen.
- Enter the Pipeline name to be created in the pop-up and click the "**Submit**" button.



Edit Pipeline

To edit a pipeline the admin should follow these steps,

- Navigate to the three dots on the right side of the default pipeline
- Click on "**Edit**"



- The admin can edit the "**Stage name**", "**Playbook**", "**Teams**" and enter "**Task type**" for that specific stage

    1) **Stage Name:** Admin can update the stage name for the pipeline.
    2) **Update the Playbook:** Admin can select/update a playbook and add them into their Pipeline list.
    3) **Update the Teams:** Admin can select/update the teams for that specific stage and add them into their Pipeline.
    4) **Update Task Type:** Admins can select/update the task type for selected stage.

- Click on "**update**" after all the changes have been made

Add New Stage

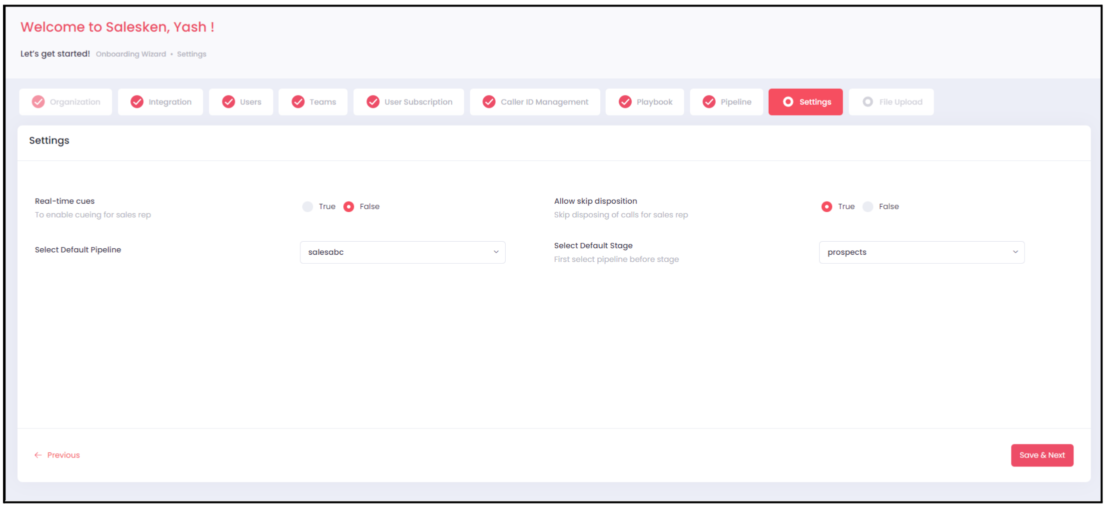
- Click on "**Add New Stage**" (Pop Up appears)
- Enter the "**Stage Name**"
- Select the Playbook
- Select the teams for that stage
- Click on the "**Submit**" button to add a new stage.
- Once all the configurations are done on the "**Edit Pipeline**" page
- Click on the "**Update**" button on the bottom right corner of the page to update the changes made.

Settings:

This page allows the admin to configure the settings for the entire organisation. It helps to manage and authorise organisational information. The admin has control over the functions performed by the Sales Managers and Agents.

There are various fields that the admin can configure on this page,

- **Real-time cues:** This setting enables/disable the real-time cueing option for the sales representative
- **Allow Skip Disposition:** This setting enables/disables the sales rep to skip call disposition
- **Select Default Pipeline:** This assist the admin to select the default pipeline for the organization
- **Select Default Stage:** This assists the admin to select the default stage for the organization



Clicking on the "**Submit**" button in the bottom right corner to set the organisation according to the settings configured by the admin.

File Upload:

File upload is the feature that enables the manager to assign files to any users by simply searching the name in the search dropdown and uploading the respective files.

To upload a file for a specific sales rep follow these steps,

- Click the **Menu bar**
- Drop down to "**File Upload**"
- Select Sales Rep: Select the Sales Rep from the dropdown under whom you want to upload the file.

- Drop Files here or click to upload: Here we can upload files in mp3,mp4,wav, and .au format. We can upload a maximum of 40 Mb files.

We can cancel the uploading file in between by clicking the "**Cancel Upload**" Option.

Multiple Files Uploading:

- The admin can upload multiple files simultaneously.
- A file of a maximum size of 40 Mb can be uploaded.